Children with special needs typically transition from early intervention to preschool, kindergarten, middle school, high school, and ultimately to adult life. Successful transitions require special preparation for the transition itself and each next step. The Individuals with Disabilities Education Improvement Act of 2004 (IDEA; P.L. 108-446) recognizes the particular importance of preparing children and families for transition at two distinct points:

- The move from early intervention under IDEA Part C for Infants and Toddlers to preschool or kindergarten school services under IDEA Part B for children ages 3 to 21 (early childhood transition)
- The move from high school services to adult life after graduation or at age 21 (or older in some states) under IDEA Part B (secondary transition)

The overall goal of IDEA is to prepare children with disabilities for “further education, employment, and independent living” [34 CFR 300.1(a)] [20 U.S.C. 1400(d)(1)(A)]. Transition planning and services are included in the law to benefit children and youth at these critical points to assure that the movement from one setting, school, program, or grade will be done appropriately and effectively and thus allow the child to improve both academic and functional skills and to successfully participate in the next stage.

Transition planning refers to the section of the individualized education program (IEP) that describes the services and activities needed to prepare for both early childhood and secondary transitions. Early childhood transition planning must begin by age 2½ years for children exiting Part C services for Part B services. The transition plan includes information that would help the child and family plan for the future, such as community program options and information on the local education agency (LEA, commonly known as the school district), as well as next steps to be completed. Secondary transition planning must begin by age 16 or earlier in some states. The transition plan defines the student’s long-term goals and desired outcomes following graduation or aging out of high school. Transition assessment occurs throughout the transition planning process. Determining a student’s capacity for participating in the roles and tasks necessary for success in the next environment, including needed supports, occurs during assessment.

Transition services for young children include supports for a smooth and effective transition either from Part C to Part B services, or when exiting Part C services. These supports can include formal notifications by the lead agency of early intervention services to an LEA of a potentially eligible child; transition conferences and meetings to develop the transition plan; and the transition plan itself, which includes specific and appropriate steps for the child and family to exit Part C. Each of these supports has a specific notification, timeline, and other requirements to reduce inconsistencies and potential lapses in services. For older students, transition services are specified in IDEA to be provided to enable achievement of the transition plan goals. These services must be based on the individual child’s needs, strengths, preferences, and interests. IDEA allows these services to include educational services and related services, including occupational therapy and community experiences. Services can focus on such areas as developing independent living skills, evaluating vocational interests, developing study skills, or identifying assistive technology needs that will support future work, study, or community living.

Although they are not mandated in IDEA, transitions between schools and grades also require planning and specialized services to support the adjustments necessary for student success as they move to new school environments and classrooms. These transitions are critical times for families and children within the educational system and thus should be addressed as a part of children’s IEPs.
**What is the distinct role of occupational therapy in transition?**

School-based occupational therapy practitioners (OTPs) are key contributors within transition teams because they promote students’ functional abilities and participation in daily routines. For children transitioning from early intervention programs to school, OTPs adjust the school demands to match the student’s strengths and abilities, including participating in classroom activities, socializing with peers, and engaging in pre-academic tasks. For students transitioning from one school to another or between grades, OTPs help students adjust to the higher expectations of the new environment by establishing new routines, developing new skills needed for independence in adulthood, and engaging in appropriate social interactions. For students moving from school to adult life, OTPs focus on helping them gain the skills for employment or further school, demonstrating self-determination, and ultimately living as independently as possible (See Table 1).

**Table 1. How occupational therapy practitioners support transitions throughout the lifespan**

<table>
<thead>
<tr>
<th>Early Childhood Transitions</th>
<th>Transitions Throughout School Years</th>
<th>High School to Adult Life Transitions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prepare the family and child for changes in roles and routines (e.g., child taking on the student role, caregiver participation differences in school versus early intervention)</td>
<td>Prepare the family and child or youth for changes in roles and routines (e.g., student taking on more responsibilities with each change in grade level)</td>
<td>Prepare the youth, family, and community agency representatives for changes in roles and routines (e.g., the role of youth changes from student to worker)</td>
</tr>
<tr>
<td>Educate the family and school staff on diverse needs of the child in the new setting (e.g., educating a family about how a child’s disability will impact school participation and how this will be addressed)</td>
<td>Educate the family and school staff on diverse needs of the child or youth in the new setting (e.g., educating staff about how a student’s disability may influence their ability to participate in classroom activities)</td>
<td>Educate the family, school staff, and community on diverse needs of the youth in the new setting (e.g., educating members of a community agency about how to support youth to live in a group home)</td>
</tr>
<tr>
<td>Evaluate ways to support school participation (e.g. observe how the student gets along with others)</td>
<td>Evaluate ways to support school participation (e.g. assess ways that using a tablet helps participation in group activities)</td>
<td>Evaluate supports for employment, further education, and independent living (e.g. observe youth while at their job)</td>
</tr>
<tr>
<td>Facilitate skills needed for school participation (e.g. create opportunities for student to play with others at recess)</td>
<td>Facilitate skills needed for school participation (e.g., develop a daily classroom chore list for students to complete)</td>
<td>Facilitate skills needed for employment and/or further education and independent living (e.g., teach youth how to use the bus system to travel to community settings)</td>
</tr>
<tr>
<td>Help children and families develop advocacy skills (e.g., coach families on how to work with staff to plan for their child’s success in school)</td>
<td>Help children and families develop advocacy skills (e.g., coach students on how to communicate their needs to others)</td>
<td>Work with youth to develop self-determination skills for community participation (e.g., practice assertive communication skills with youth in community and work settings)</td>
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<tr>
<td>Enhance play and social skills for the school environment (e.g., provide opportunities for supported cooperative play)</td>
<td>Enhance play and social skills for the school and community environments (e.g. provide opportunities for practicing role-playing during games and age-appropriate play activities)</td>
<td>Enhance skills needed for social and leisure participation in the community (e.g. coach youth on how to ask for what they want)</td>
</tr>
<tr>
<td>Assist with school mobility, and recommend adaptations, accommodations, and equipment (e.g. select the best chair and desk for the child’s needs in the classroom)</td>
<td>Assist with school mobility, and recommend adaptations, accommodations, and equipment (e.g. adapt classroom tools for use during the school day)</td>
<td>Assist with community mobility, and recommend modifications, and equipment (e.g. evaluate the need for supports in new settings)</td>
</tr>
<tr>
<td>Collaborate with the transition team, including families, to coordinate child health care resources and community-based services (e.g. suggest outdoor spaces for safe and independent free play)</td>
<td>Collaborate with the transition team, including families, to coordinate child and youth health care resources and community-based services (e.g. suggest after school activities that match child’s abilities)</td>
<td>Collaborate with the transition team, including families, to coordinate adult health care resources and disability benefits, and promote self-advocacy skills (e.g. help set up a calendar to remind when to make needed appointments)</td>
</tr>
</tbody>
</table>
**Best Practices for Transitions in Schools**

Occupational therapy is a primary service in early intervention (IDEA Part C) and a related service in special education (IDEA Part B). Under the Every Child Succeeds Act of 2015 (ESSA, Pub. L. No. 114-95), occupational therapy practitioners are designated as specialized instructional support personnel (SISP). They have the specialized knowledge and skills to be an important informal or formal member of the transition team.

**Occupational therapy practitioners support positive transition outcomes for students during early childhood transitions to:**
- achieve successful inclusive preschool and kindergarten experiences
- develop balance for work and play
- learn independence in self-care and daily living routines

**Occupational therapy practitioners support positive transitions between schools and grades to:**
- successfully adjust to new school and classroom environments
- develop skills needed for work and independent living tasks
- have opportunities for positive peer interactions

**Occupational therapy practitioners support positive transition outcomes for high school students transitioning to adulthood by helping to:**
- develop and sustain positive work habits and study skills, and achieve success at technical schools or colleges
- learn strategies for successful community living
- acquire self-determination and self-advocacy skills
- develop and maintain supportive relationships with others

Specific examples of occupational therapy interventions for successful transitions include:

**A. Supporting families:**
- **Using a family-centered approach**—Ensure that a family’s needs and wants are addressed in the transition-planning and implementation processes.
- **Fostering relationships**—Create positive relationships to support consistent expectations for skill development and information exchange during the transition process.
- **Providing relevant and understandable information**—Share clear, correct, timely information about therapy and the transition supports families’ understanding of transition.
- **Collaborating and advocating in transition teams and activities**—Attend site visits or open house events with families for potential new programs, and provide recommendations for environmental modification that enhance child engagement.
- **Establishing guidelines about communication**—Work with family members to determine the best frequency and method of communication if you do not see each other during each session.
- **Setting expectations about the new environment**—Help families understand the structure, services, and responsibilities of team members in the new environment that may be different from previous settings, including eligibility processes, required time-lines; procedural safeguards; and the role of related services in a child’s special education program.

**B. Supporting students:**
- **Preparing the child for the transition**—Teach specific skills to help the child meet the expectations of the new environment.
- **Providing assistive technology**—Provide assessment and training in how to use high-tech and low-tech devices to support independence in activities of daily living, play, school work or paid work.
- **Supporting Community mobility**—Teach students to use public transportation and maps, and find accessible routes to school or the workplace.
- **Building skills for supportive employment**—Address skills needed to be successful in job tasks by coaching students during actual and simulated work activities through job site visits and job carving.
- **Developing social skills necessary for community life**—Work with students to improve social interactions with peers and co-workers through training on specific communication, as well as school and workplace expectations.
- **Improving daily living routines (activities of daily living and independent living skills)**—Break down and teach students with disabilities the steps for completing tasks and routines needed to achieve the highest possible levels of independence, such as dressing, hygiene, and meal preparation.
• **Promoting safety, wellness and health**—Help students to identify ways to establish healthy daily routines (i.e., sleep patterns that support learning as well as positive mood and behavior).

• **Addressing sensory processing challenges**—Evaluate and make recommendations for sensory-based accommodations in school settings and on job sites and other relevant environments, such as lowering the brightness of lighting and suggesting noise-cancelling headphones in busy areas.

• **Providing leisure coaching**—Help students participate in activities that help them make and keep friends.

Occupational therapy contributes to meeting required state performance plan (SPP) transition indicators. For instance, occupational therapists have the knowledge and skills to assist youth in identifying their future goals and ways to achieve these goals, which is a component of SPP Indicator B-13. Integrating occupational therapy with supported employment opportunities will support SPP Indicator B-14, which measures post-school outcomes. Smoother transitions result in positive outcomes for students and families. Occupational therapy builds students’ abilities to transition to new settings, establish necessary roles and routines, and participate in activities that will support independence in home, work, and community environments through adulthood.

**References**