

## Transition Planning: Invitation and Briefing Process for ASD

This outlines how transition planning documentation and processes are managed between PIC and ASD. The goal of these changes is to clearly delineate responsibilities, streamline workflows in RainTree (RT), and to continue to support ASD in their ownership of sending and tracking their application materials with families.

PIC and ASD have jointly agreed that PIC will provide the invitation and briefing and share the Functional Evaluation as part of the transition planning process. PIC will also share any other relevant information in the process, including sending additional consults, calendar invite, and notice of withdrawal from the process. Once ASD receives the invitation, they will generate and send their own application packet from PandaDoc.

### Transition Plan Responsibilities in this process:

At the transition planning meeting, the PSP:

- Creates and sends the ASD ROI to the family using RainTree **or** obtains a paper ROI and submits it to Admin.
- Completes the Invitation and Briefing form in RainTree, which remains in a pending state until the ASD ROI is signed by the family and returned if in hardcopy.

### Procedure

Staff will help complete **two documents that are meant to facilitate transition to ASD**. The provider facilitates both of these at, or after the Transition Planning meeting:

#### 1. ASD ROI (Complete and send to family)

This is a prefilled document that has attached autotasks. When you send the ASD ROI to families after the Transition Plan Meeting from RT, autotasks will be sent to remind you to follow up.

Find the ASD ROI form in Admin tab → All PT Signature Forms (see picture)

The screenshot shows the RainTree software interface. On the left, a sidebar menu has a purple circle around the 'Click to Open/ Admin' button. Below it, a list of forms is shown, with 'ASD ROI' highlighted by a purple arrow. The main window displays the 'Authorization To Release And Obtain Information' form. It includes fields for 'Patient Information' (Child's First Name: Ebetha, Child's Last Name: Test, Date Of Birth: 01-01-25) and 'Record Information' (Date: 01-02-26, End Date: ). The form contains a consent statement: 'This protected information is being used or disclosed for the purpose of Early Intervention assessment & planning, coordination of services and treatment. Reports not generated by this agency may not be released.' and a signature line: 'I hereby authorize Programs for Infants & Children Inc. to release and/or obtain from: Anchorage School District'. At the bottom, it says '(person or organization - only one person/organization for each authorization form)'.

## 2. Complete the Invitation and Briefing (sent to ASD ONLY)

After the Transition Planning meeting, PSPs complete designated sections of the Invitation and Briefing in RainTree which is meant to be a communication with ASD.

Required information includes:

- 90-day meeting date and time and meeting location
- Primary family contact (with confirmed email and phone number),
- Family questions or concerns, eligibility age indicators, and the family's preference for electronic or paper forms.

Find the Invitation and Briefing form in Admin tab → PT Signature Forms (see picture)

The screenshot shows the 'ASD Transition Invitation and Briefing' form in RainTree. The form is divided into several sections:

- Demographic Info:** Patient First Name (Elizxx), Patient Last Name (Test), Patient DOB (01-01-24), Date Created (01-16-26).
- Primary Service Coordinator:** Sw006, Victoria Kendall, Phone (907) 250-6637, Email vkendall@picak.org.
- Transition Meeting Info:** Date of PIC Transition Conference (03-01-26), Time (10:00a), Meeting location (Online via video conference).
- Parent/Guardian Info:** Name (First Last), Email Address (etrenor@picak.org), Cell Phone (907) 123-1234, Home/Other Phone.
- Questions or concerns family has for transition meeting with ASD:** A text area for notes.
- For PIC Staff:** Check to confirm the following: ☒ Upon receipt of ROI, a calendar invite will be sent to ILP@asd112.org, ☐ Child is 31.5 months or older when Part C eligibility was determined.
- For ASD:** Note, ASD I, Coord.
- The family:** ☐ Prefers electronic forms, ☐ Prefers paper forms only.
- Authorizations To Release and Obtain Information:** A table with columns Date, Release To, End Date.
- Select a Form:** A dropdown menu showing a list of forms: Patient Signature Forms, 10 day letter new, 30 day letter, ENR Decline Disclaimer, No Records Letter, Referral Feedback Form, and ASD Invitation and Briefing Letter (highlighted with a purple arrow).
- Patient Demographics and Consent:** A table with columns Date created, Description, Signed, Sent Info. It shows a record for 12-22-25, ASD Briefing and Invitation.

Note: the **Briefing section** specifically provides ASD with context for the evaluation and includes information such as developmental and medical concerns, autism related questions or diagnoses, AAC use, sensory or feeding concerns, mobility, transportation needs, interpreter needs, and family dynamics that may impact the evaluation process. This related questions or diagnoses, related questions or diagnoses, related questions or diagnoses, related questions or diagnoses, -related questions or diagnoses, information helps ASD determine the most appropriate next steps.

**\*\*Set a Transition Conference appointment with Melissa Kelley at ASD who attends 90-day meetings by contacting her at 907-742-1376. For more complex evaluation situations that may require the ASD evaluation team -- go through the link here to set appts:**

[PIC-ASD Transition Conference Appointments](#)

## **Autotasks and Follow-Up**

When the RainTree ASD ROI is e-signed, PSPs receive an autotask reminding them to complete necessary follow-up actions, such as sending calendar invitations to ASD, finalizing the invitation and briefing, and sending any additional documents. If paper ROIs are used, the PSP must submit them, and the Admin Team uploads them in RainTree to ensure tasks are generated appropriately.

The screenshot displays a task management interface with the following fields and options:

- Task Type:** ASDL, PSP: ASD ROI signed
- Provider:** Sw006, Victoria Kendall, LCSW (with buttons for View Scheduler and View Patient Info)
- Send To:** Sw006, Victoria Kendall
- Location:** (dropdown menu)
- Final Route:** (dropdown menu)
- Original Due Date:** (dropdown menu)
- Category:** TASK, Task Record
- Priority:** (dropdown menu)
- Case:** 00000, Default program code
- Primary Ins FC:** A Medicaid/Xerox
- Comment:** -Primary Ins - MDCD
- Created By:** Connect Applets
- Created on:** 01-16-26
- Source:** 01-16-26 ASD ROI (highlighted in green)
- EMR:** [Empty]
- History:** Other Records (with a Duplicate Task button)

The history section contains a message: "01-16-26 06:13a (Connect Applets) An ASD ROI was signed by the family. This is a reminder to take actions that may need to occur (ie, send a Calendar invite to ASD, create Invitation & Briefing letter, send other documents as needed). Thank you!"

Admin simultaneously receives a similar autotask indicating that an ASD ROI has been signed. If the Invitation/Briefing and Functional Evaluation are available in RainTree, Admin sends these documents to ASD via email. This coordinated tasking ensures no steps are missed once consent is obtained.

## **ASD Process After Receiving the Invitation**

Upon receipt of the invitation, ASD contacts the family to confirm contact details. ASD reviews the briefing information and, for most families, sends their PandaDoc application packet. PSPs are copied on this communication for awareness only; there is no additional paperwork for PSPs to complete. For families who prefer paper forms, ASD manages mailing and notifies both the family and PSP that it has been sent.

If applications are incomplete by the 90-day meeting or for later referrals, ASD may complete the application during the meeting, provided required ASD ROIs are signed.

### Additional Considerations

- PSPs may request from the Admin Team that additional reports be emailed (consults or assessments) as needed—PSP may email admin or respond directly to the RT ROI autotask.
- If a family withdraws from the transition process, ASD must notify the family of exit once PIC has communicated the change. PSPs should notify ASD promptly if a child is no longer in our services and was in process at ASD.
- Completion of the invitation can be verified by receiving a cc'd ASD application email or by reviewing the RT Disclosures box.

Disclosures						
Date	Time	Locat...	Sent to	Name	Method	Reas
01-07-26	06:14a		(907) 7...	BRISCOE, REBEKAH G	FAX	POC:
09-11-25	05:54a		(907) 7...	BRISCOE, REBEKAH G	FAX	POC:
03-25-25	09:49a		(907) 7...	BRISCOE, REBEKAH G	FAX	POC:
03-17-25	10:12a		(907) 7...	BRISCOE, REBEKAH G	FAX	POC:
03-03-25	09:32a		(907) 7...	BRISCOE, REBEKAH G	FAX	Func