



TRANSITION ASSESSMENT CHECKLIST

Using the components of this checklist in assessment practices supports the development of a quality plan that is meaningful to the student's transition to adulthood.

PLANNING FOR ASSESSMENT

- Assessments conducted and included in the IEP in the school year in which the student turns 16 or earlier if transition planning is deemed appropriate prior to age 16.
- Assessments should be “age appropriate” for the student’s chronological age rather than developmental age.
- Assessments should be conducted for ALL students regardless of the student’s ability level. They may require adaptations to obtain meaningful data.
- Assessment data should include more than one measure.
- Assessment measures should take into consideration cultural and linguistic diversity.
- Assessment data should be comprehensive and address students’ needs, strengths, preferences, and interests.
- Assessments should include more than observational data or a student interview.
- Assessments should include at least one formal in addition to informal measures.
- Assessments should be conducted on an ongoing basis. Data is collected throughout the year.

ASSESSMENT IN THE IEP

- Assessment data collected over time should be documented in the IEP.
- Assessment data should be written in a format that is jargon-free and easily understood by the student and their family.
- Assessment data should drive the plan, beginning with postsecondary goals.
- A statement should be included that indicates the postsecondary goals were updated using current assessment data and provides a description of skill, knowledge, and behavior gaps.
- A clear link should be present between assessment data, annual goals, course of study, and transition services.



The Transition Assessment Checklist is based on legislation, litigation, NTACTION-C guidelines, and recommended practices surmised from these sources. Within IDEA 2004, Indicator 13 includes the need for age-appropriate transition assessments (AATA); however, there has been an increase in indicator-related transition litigation, including the use of AATA (Prince, et al. 2020). Despite their importance and increased federal focus, there exists a concerning lack of familiarity, awareness, and interest in age-appropriate transition assessment (Rowe, et al., 2015). The failure to appropriately assess students in preparation for transition plans led to litigation, which has notably increased since the 2004 IDEA reauthorization (Yell, 2018).

Below is a description of the evidence to support each point on the checklist and recommendations for adjustments to personalize the checklist.

PLANNING FOR ASSESSMENT

- ❖ Assessments conducted and included in the IEP in the school year in which the student turns 16 or earlier if transition planning is deemed appropriate prior to age 16.
 - *IDEA indicates transition services begin no later than the first IEP before a student's 16th birthday; however, the act allows IEP teams to begin transition services earlier. 34 CFR 300.320 (b).*
 - *Transition planning, including services, must be based on age-appropriate transition assessment. If an IEP team elects to begin transition planning before it is required, the standards outlined in the IDEA still apply (OSERS, 2011).*
 - *The age at which transition assessments need to be completed is dependent on SEA guidelines. The checklist should be adjusted per SEA guidelines.*
- ❖ Assessments should be “age appropriate” for the student’s chronological age rather than developmental age.
 - *Although IDEA (2004) does not define what is meant by age-appropriate, an interpretation may be found in the NSTTAC Indicator 13 FAQ, which was approved by OSEP (NSTTAC, 2018). Here, age-appropriate is defined as a student’s chronological age and not their developmental age (Wehmeyer, 2002).*
- ❖ Assessments should be conducted for ALL students regardless of student’s ability level. They may require adaptations to obtain meaningful data.
 - *IDEA states that a transition-focused IEP must include appropriate measurable postsecondary goals based upon age-appropriate transition assessments related to training, education, employment, and, where appropriate, independent living skills (IDEA, 2004). The requirements for postsecondary IEP goals apply whether or not the student's skill levels related to training, education, and employment are age-appropriate. In all cases, the IEP team must develop specific postsecondary goals for the student in light of the unique needs of the student as determined by age-appropriate transition assessments of the student's skills in these areas. (Endrew F. v. Douglas County School District, 2017). U.S. Supreme Court via the 10th Circuit Court of Appeals.*

- *The fact that a student has severe communication or cognitive deficits does not excuse a district from conducting age-appropriate transition assessments. If a district finds itself struggling to evaluate the student, it should contact the SEA for assistance in selecting appropriate assessment tools (Student with a Disability v. Montana State Educational Agency, 2013). Montana State Due Process ALJ Ruling*
- *Student ability levels may facilitate the need for adaptations to age-appropriate assessments in order to obtain meaningful data at their chronological age (NSTTAC, 2022).*
- ❖ *Assessment data should include more than one measure.*
 - *Although IDEA does not mandate any particular transition assessment, one student interview alone is insufficient. The need for appropriate transition assessments in IEP development and adequate transition services can prevent “educational harm” to the student (S.G.W. v. Eugene Sch. Dist., 2017). United States District Court for the District of Oregon Eugene Division*
 - *Although the IDEA (2004) mandate regarding age-appropriate is left open to interpretation, one age-appropriate transition assessment is not enough to meet the federal mandate to satisfy FAPE (Neubert & Laconte, 2013).*
- ❖ *Assessment measures should take into consideration cultural and linguistic diversity. (DCDT, 2018).*
- ❖ *Assessment data should be comprehensive and address students’ needs, strengths, preferences, and interests.*
 - *Assessments must be comprehensive and include the student’s needs, strengths, preferences, or interests (Gibson v. Forest Hills Local School District, 2016). U.S. District Court, Southern District of Ohio*
 - *Comprehensive transition-related assessment data should measure student performance across the domains of adulthood (Cronin & Patton, 1993).*
- ❖ *Assessments should include more than observational data or a student interview.*
 - *Although IDEA does not mandate any particular transition assessment, one student interview alone was insufficient (Forest Grove Sch. Dist. v. Student, 2014). United States District Court District of Oregon Portland Division 2017 - Remanded back to ALJ Decision from 2014.*
 - *Observational data on student preferences may not be substituted for age-appropriate transition assessments. Informal assessment alone is not enough to identify transition-related preferences (Gibson v. Forest Hills Local School District, 2016). U.S. District Court, Southern District of Ohio*
- ❖ *Assessments should include one formal in addition to informal measures.*
 - *Schools must use a formal assessment to identify student preferences and interests (Gibson v. Forest Hills Local School District, 2016). U.S. District Court, Southern District of Ohio*
- ❖ *Assessments should be conducted on an ongoing basis. Data is collected throughout the year.*
 - *IDEA indicates transition-related assessments be conducted on an annual basis with the requirement that postsecondary goals are updated annually using age-appropriate*

transition assessments. However, the *Endrew v. Douglas County School District (2017)* stated “de minimis” was not enough to address educational benefit. U.S. Supreme Court

ASSESSMENT IN THE IEP

- ❖ Assessment data collected over time should be documented in the IEP.
 - *IDEA indicates transition-related assessments be conducted on an annual basis with the requirement that postsecondary goals are updated annually using age-appropriate transition assessments. However, the Endrew v. Douglas County School District (2017) stated “de minimis” was not enough to address educational benefit. U.S. Supreme Court*
- ❖ Assessment data should be written in a format that is jargon-free and easily understood by the student and their family (*DCDT, 2018*).
- ❖ Assessment data should drive the plan, beginning with postsecondary goals.
 - *Age-appropriate transition assessment data must link to a student’s IEP goals and services (Somberg v. Utica Community Schools, 2017). U.S. District Court, Eastern District of Michigan*
- ❖ A statement should be included indicating the postsecondary goals were updated using current assessment data and provides a description of skill, knowledge, and behavior gaps.
 - *The IEP should include a statement that indicates the postsecondary goals are updated annually by linking transition assessment data to the appropriateness of the postsecondary goals and discussing the student’s needs that close the skill, knowledge, and behavior gaps (NSTTAC, 2012).*
- ❖ A clear link should be present between assessment data, annual goals, course of study, and transition services (*Peterson, 2020*).