Using the Ohio Independent Living Reporting Tool (OILRT)

Knowledge Base Article

Using the Ohio Independent Living Reporting Tool

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Overview

This article describes how to document expenditures for youth receiving Independent Living services using the Ohio Independent Living Reporting Tool (OILRT).

In Ohio, each county Public Children Services Agency (PCSA) is required to provide Independent Living services to all youth ages 14 and older who are in foster care, to help prepare them for future self-sufficiency. These services include, but are not limited to, the following:

- Academic support
- Post-secondary educational support
- Career preparation
- Employment programs or vocational training
- Budget and financial management
- Housing education and home management
- Health education and risk prevention
- Family support and healthy marriage education
- Mentoring
- Supervised independent living
- Room and board financial assistance

PCSAs can use the Federal Chafee Program and TANF Independent Living Funds to support many of these activities. Please see the links in Appendix A below for additional guidance on allowable and unallowable expenditures.

Accessing the OILRT

1. To gain access to the tool, you will need to have your county process a digital JFS7078 Form, requesting the role of EIDMX_JFS_C - OFC - Independent Living County Worker. This will need to be processed through Access Control.

Logging In

1. Navigate to the OILRT site: https://ohioindependentliving.childrenandyouth.ohio.gov
2. Enter your **Login Id:** which is your 8-digit OH|ID.
3. Enter your current OH|ID **Password**
4. Click the **Login** button.

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A successful log-on will navigate user to the main page with the message **Welcome to Ohio Independent Living Reporting Tool**.
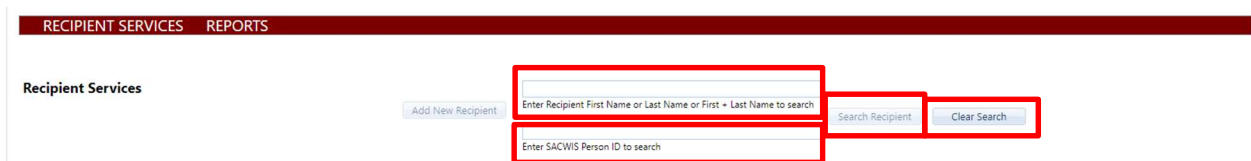
Search Recipient

1. Click on the **Recipient Services** link in the maroon header bar.

The **Recipient Services** page appears.

2. Enter the Recipient's **First Name** and/or **Last Name**

   OR

3. Enter the **SACWIS Person ID**

4. Click the **Search Recipient** button

5. Alternatively, you may click the **Clear Search** button to erase your search criteria and re-start the search process.

Upon clicking **Search Recipient**, the **Recipients** grid appears with any applicable search results.

Important: Please conduct a thorough search for the individual to prevent creation of duplicate records.

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Adding/Editing Recipient Records

After conducting a search for a Recipient, you may add a new record for a Recipient or edit the existing Recipient details.

Adding a New Recipient

If no search results were found for the Recipient, the results grid displays with the message **No recipient record**. To add a new record:

1. Click the **Add New Recipient** button.

Note: The Search Criteria entered will not copy into the new record but will remain at the top of the page for reference.

2. Enter **Recipient Details**, starting with **First Name** *(required)*.

3. Enter Recipient **Last Name** *(required)*.

4. Enter the **SACWIS Person ID** *(required)*.

   Note: If the **Person ID** already exists in the system, the validation message Person ID exists will appear.

5. Indicate if the youth is homeless by checking the **Homeless?** box.

6. Select the **County** where the Recipient is currently living *(required)*.

7. Enter **Address 1** *(required)*.

8. Enter **Address 2**, if applicable.

9. Enter **City** *(required)*.

10. Enter **State** *(required)*.

11. Enter 5-digit **Zip Code** *(required)*, +4 extension if known.

12. Enter **DOB** *(required)*

13. Click the **Insert** hyperlink to save the record.

    OR

14. Click the **Cancel** hyperlink to delete Recipient details.

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Note: The system will validate entry of all required information in red beneath the Recipient Details and will need to be entered before the record can be saved. If the youth is recorded as homeless, the address fields will no longer be required.

Clicking **Insert** will produce the following pop-up:
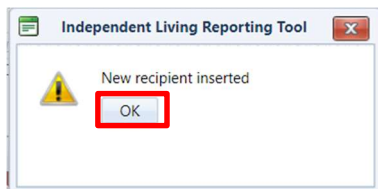
15. Click **OK** to continue.

Editing an Existing Recipient Record

If the **Name**, **Residence County**, **Homelessness Status**, **Address,** or **DOB** of the Recipient needs to be edited:

1. Find the desired record by using the **Search Recipient** button as outlined above.

2. Click the **Edit** hyperlink to the right of the Recipient record.

The **Recipient Details** appear.

3. Modify any of the existing entries as needed.

4. Click the **Update** hyperlink upon completion.

   OR

5. Click the **Cancel** hyperlink to discard any changes to the record.

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Clicking **Update** will produce the following pop-up:
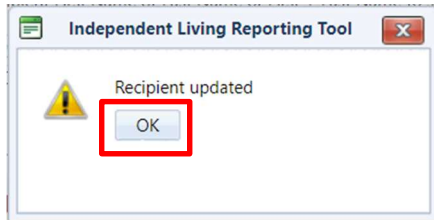
6. Click **OK** to continue.

Note: A recipient's **Person ID** becomes uneditable after the recipient record is created. If you discover you entered a **Person ID** in error, before entering any service records for the recipient, you can delete the record and re-enter it correctly.

Adding Services

1. Find the desired record by using the **Search Recipient** button as outlined above.

2. If the individual exists in the system, the **Services for {Recipient Name}** grid will appear below the **Recipients** grid.

   Important: If multiple records display for the search criteria entered, click on the desired Recipients record in the grid to switch to the **Services for {Recipient Name}** specific to that individual.

3. Click the **Add Service** button underneath the **Services for {Recipient Name}** header.

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For a Recipient with no existing services, the screen will expand for addition of a new record.

Important: All fields marked with a red asterisk (*) are required to save the record.

4. Enter the **Application Date:** with a format of MM/DD/YYYY or select the date from the Calendar icon (▦).

5. Enter the **Benefit Issuance Date:** with a format of MM/DD/YYYY or select the date from the Calendar icon (▦)*(required)*.

6. Confirm **Agency of Service**. The system will automatically populate the agency of the logged-in worker *(required)*.

7. Enter **Denial Date:** with a format of MM/DD/YYYY or select the date from the Calendar icon (▦), if applicable.

8. Check the box next to **Are you the worker?** if applicable. If this box is checked, the name of the logged-in user will automatically fill in the **Worker First Name:** and **Worker Last Name**.

9. If the **Are you the Caseworker?** box is not checked, entered the **Caseworker First Name:** and **Caseworker Last Name** *(required)*.

10. The **Recipient Address: City, State, and Zip Code,** will pre-fill based on the information contained in the Recipient Details record. Confirm this information is correct, or alter any values as needed *(required)*. If the youth is homeless, these fields will be blank.

11. Choose the **Youth Status:** from the drop-down values of **In Agency Custody**, **Emancipated: Under the age of 21,** or **Emancipated: Over the age of 21** *(required)*.

12. If the value selected above is **Emancipated Under 21**, the system will display the **Bridges Participant?** question. Select the radio button for **Yes** or **No** *(required)*.

13. Choose **Funding:** from the drop-down values of **TANF IL**, **Chafee** or **Local Funding Source** *(required)*.

14. Depending on the value selected above, the **Benefit Category:** and **Benefit Sub-Category:** values will modify accordingly. Select the most appropriate values to describe the Benefit being issued *(required)*.

   Note: See Appendix B below for a complete list of available **Benefit Categories** and **Benefit Sub-Categories.**

15. Select the **Yes** or **No** radio button for the question **Gift Card?**

16. If the answer to the above question was **Yes**, the additional question of **Reconciled?** appears. Select the **Yes** or **No** radio button in response.

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17. Enter **Value of Benefit:** in numerical values only (do not add a dollar sign or comma) with a decimal point separating the dollars and cents. If a whole number is added the system will automatically add .00 for the cents value and add a comma if applicable *(required)*.

18. Enter any **Notes:** in the text box.

19. Click **Insert** to save the benefit record

   OR

20. Click **Cancel** to erase all entered values.

Upon Clicking Insert, the system will return to the user to the Recipient Services page with the grids for **Recipients** and **Services for {Recipient Name}** updated with the new record.

Modifying Services

Once a Service record has been created, an employee from the same logged-in agency that entered the record may modify the existing record by editing or deleting.

Editing Services

1. Click the **Edit** hyperlink to the right of the **Services for {Recipient Name}** grid.

    The Benefit Application expands with all the previously answered questions.

2. Alter any data as desired.

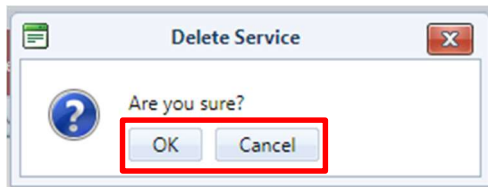3. Click the **Update** button to save the completed changes

    OR

4. Click the **Cancel** button to discard any changes to the record.

Deleting Services

1. Click the **Delete** hyperlink to the far right of the **Services for {Recipient Name}** grid.

    The following validation message appears:

2. Click **OK** to delete the selected record.

    OR

3. Click **Cancel** to retain the record and return to the list page.

Reminder: Any record entered will be editable for 120 days from the benefit issuance date. The system will lock the record in it's current format after that time frame has elapsed.

Youth Navigator Network- Flex Funds

In the Spring of 2024, **Youth Navigator Network** was added as a user type to OILRT. Navigators were given access to track the issuance of Flex Funds to emancipated foster youth, ages 21 and 22. If you are logged in as a YNN Navigator, you will see a difference in the options available when recording Recipient and Service information:

*   Navigators will only have the ability to add and edit **Recipient** information for youth ages 21 and 22.

*   Navigators will only have the ability to enter **Services** for youth ages 21 and 22.

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- Navigators will only have the **Youth Status** of **Emancipated: Over the age of 21**.

- Navigators will only have the **Funding** option of **Flex Funds**. This option will not be available for County Caseworkers.

Reports

The following 5 reports are available in OILRT:

- **OILRT Benefits by Agency Summary** – This report shows information either at a statewide level or agency level (depending on user access). Information is broken down by Agency, Category, Funding Source and Benefit Value for each Category. This report can be drilled down by Issuance Date, Agency (for state users), Youth Status and Funding Source.

- **OILRT Benefits by Age Summary** – This report shows a benefit summary by Age in each agency. Information is broken down by Category, Agency and Age Range. This report can be drilled down by Issuance Date, Agency (for state users) and Funding Source.

- **OILRT Benefits by Youth Status -** This report shows a benefit summary by youth status. Information is broken down by Category, Agency, and Youth Status. This report can be drilled down by Issuance Date, Agency (for state users) and Funding Source.

- **OILRT Full Data Report** – This report shows all recipient details and service data for each agency. This report generates and exports to Excel. This report can be drilled down by Issuance Date, Agency (for state users), Youth Status, Funding Source, and Benefit Category.

- **OILRT System User Information**- This report shows system users that currently have, or previously had, access to OILRT. Agency users will only be able to see information for their own agency, while state users will be able to populate information for all agencies. Each user record will display User Type, Affiliated Agency, First/Last Name, OHID, and User Status.

To navigate to the reports:

1. Click on the **Reports** link in the red header bar.

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2. The **Reports** page will appear, with a blue box available on the left-hand side of the page listing each report. Click on the box for the report you wish to generate.

3. The **Report Parameters** screen will appear for the selected report. Select a value from each parameter to build the report you wish to view. Then, based on available options, click **View Report** or **Export to Excel**.

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4. If **Export to Excel** is selected, an Excel report will be generated and can be opened and saved from your computer's **Downloads** folder. Please ensure your pop-up blocker is disabled to utilize this functionality.

5. If **View Report** is chosen, the report will appear directly on the screen, in a grid format. In the gray bar above the data, options for the report are available as described below.

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Pagination

If the Report has multiple pages, you will be able to scroll through them on the screen using the arrows on the left of the gray bar above the report data. The numbering will indicate how many pages are contained in the report, and which page of how many you are currently viewing.
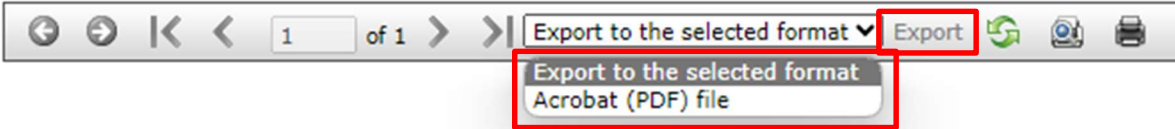

Benefits By Agency - All Youth Status

From 2/29/2024 to 3/29/2024

Exporting

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From the gray navigation bar, you may export the report into an **Acrobat PDF** document by selecting **Acrobat (PDF) file** and clicking the **Export** link next to the format drop-down. The Report will download and can be opened, then saved as desired.
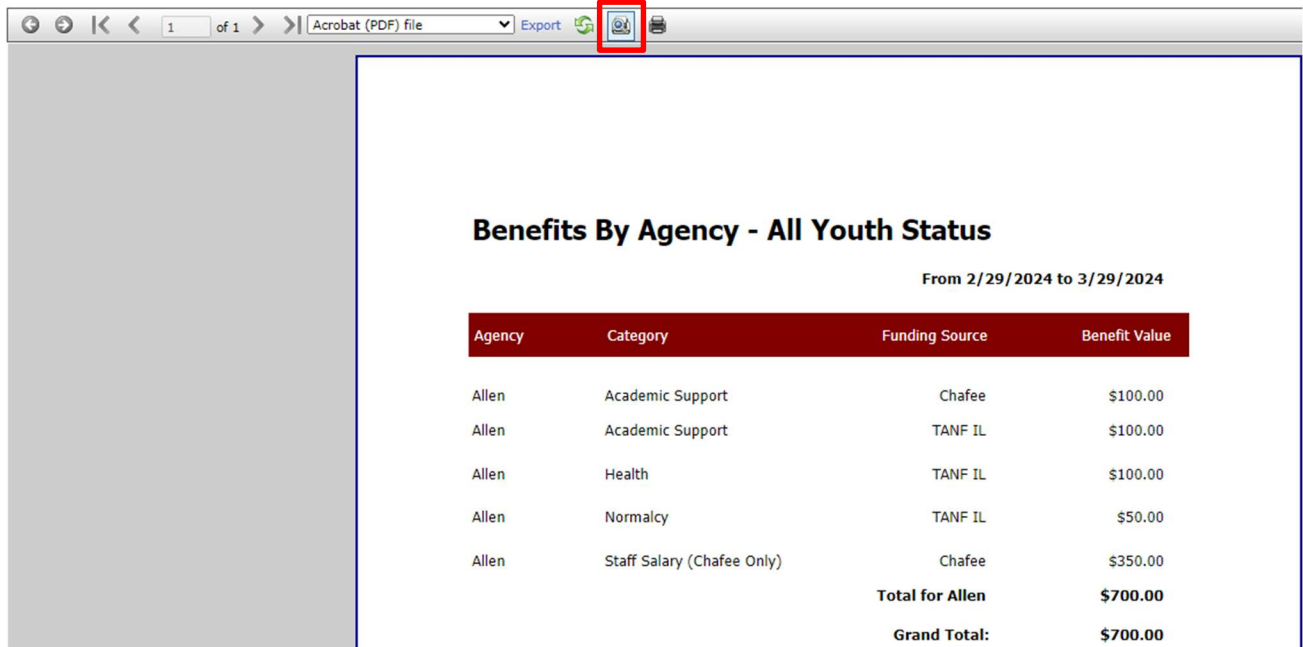
Refresh

To refresh the data being viewed, click the Refresh icon on the grey bar. The system will reload the report with any new data.

Switch to Print Preview/Switch to Interactive View

Clicking the **Switch to Print Preview/Switch to Interactive View** icon ( ) will toggle the Report in a Print Preview and back to Interactive View:

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Print

Clicking the **Print** icon will prepare the **Report** to send to a printer of your choosing.

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Help

If you need additional information or assistance regarding Independent Living Policy and Practice, please contact Transitional-Youth-Programs@jfs.ohio.gov
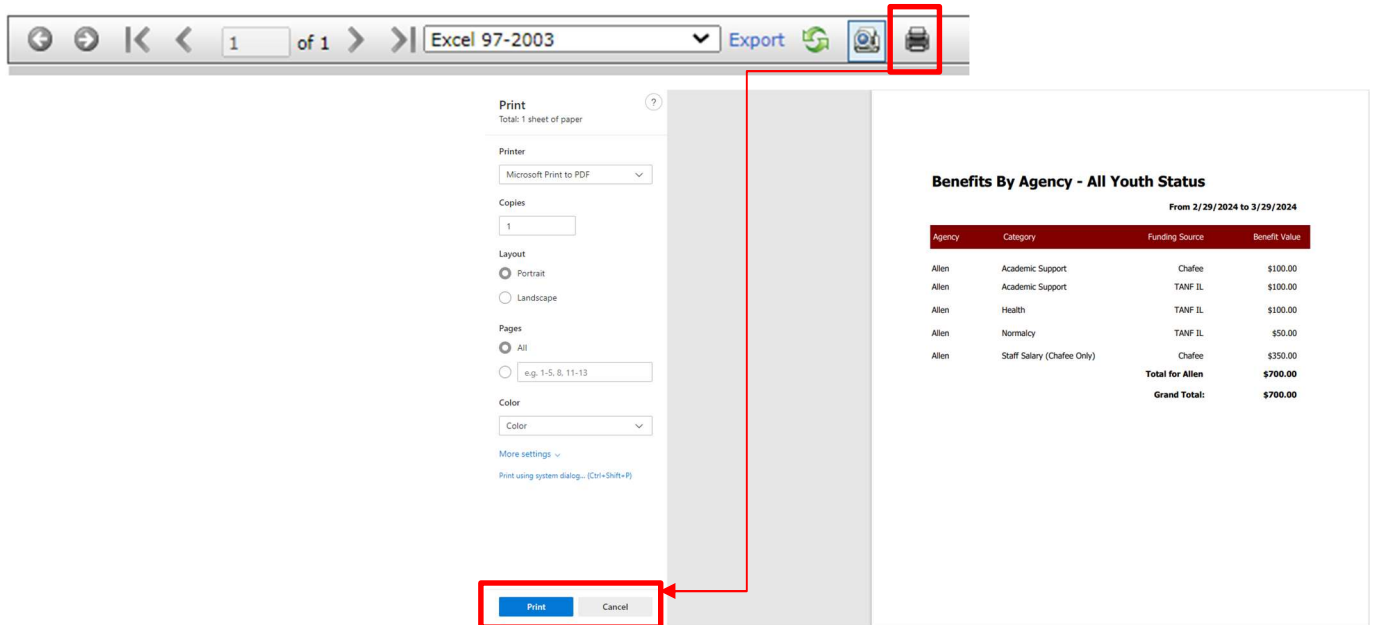
If you encounter technical difficulties while using OILRT, please submit a ticket to the DCY Automated Systems Help Desk through the Customer Care Center.

Appendix A: Additional Resources

The following links provide guidance on Ohio Independent Living expenditures using TANF IL and Chafee funds.

- 5101:2-42-19 Requirements for the provision of independent living services to youth in custody
- 5101:2-42-19.2 Requirements for provision of independent living services to young adults who have emancipated
- 5101:9-6-35 Chafee Allocation
- 5101:9-6-08.6 Temporary assistance to needy families (TANF) independent living (IL) allocation
- Fiscal Administrative Procedure Letter No. 89
- Independent Living Skills Toolkit - A guide for working with foster youth ages 14 and up

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Appendix B: Benefit Categories/Sub-Categories

Benefit Category: Values	Corresponding Benefit Sub-Category: Values
Academic Support	School Supplies Tutoring Books GED Fees School Activities IL Skills Class
Normalcy	Entertainment Social Events Travel Experiences Clothes Personal Items Name Change
Post-Secondary Educational Support	Academic Assistance Entrance Counseling Financial Aid and Scholarships Application Fees Club Fees Books Academic Supplies Tuition IL Skills Class
Employment	Career Preparation Interview Tools / Uniform IL Skills Class
Budget and Financial Management	Budgeting Exercise Checking / Savings Account Income Tax Preparation Direct Cash Assistance Incentives IL Skills Class
Housing	Room and Board
Home Management Training	Locating and Maintaining Housing Rental Application Acquiring a Lease Security Deposits Utilities Home Economics Furniture Renter's / Home Insurance Warranty IL Skills Class Food Assistance
Health	Hygiene Nutrition Training Fitness and Exercise First Aid / CPR Classes Non-Medicaid Needs Childcare Risk Prevention Education Parenting Education Parenting Support IL Skills Classes
Transportation	Driver's Education Vehicle Insurance Licensing Fees Vehicle Repairs Vehicle Payment Vehicle Purchase Uber / Lyft

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	Fuel Public Transportation Passes IL Skills Class
Staff Salary (Chafee Only)	Staff Salary (Chafee Only)