

Creating an Independent Living Plan (ILP)



Knowledge Base Article

Creating an Independent Living Plan (ILP)

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Creating an Independent Living Plan (ILP)

Overview

This article describes how to complete the following in Ohio SACWIS:

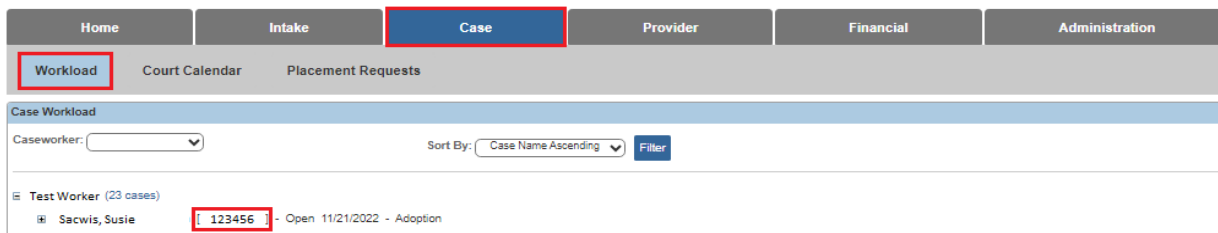
- Create an **Independent Living Plan (ILP)** with a link to the **National Youth in Transition Database (NYTD)** for a child aged 14 and older who is in an **Ongoing Case** or an **Adoption Case**.
- Create a **Final Transition Plan** (also known as a **Transition Plan**) for a child in an **Ongoing Case** or an **Adoption Case** who is within a few months of reaching age 18 and **Emancipating** out of the foster care system.
- Create an **Emancipated Youth Plan** for a post-emancipation youth who is between their 18th and 22nd birthdays and is no longer in agency custody but has returned to a public agency to request help with an issue(s).
- Record the **Credit Reports** that are requested by the agency from the three main credit reporting agencies for a child aged 14 or older. The Credit Reports will pull into the child's Independent Living Plan and Final Transition Plan.

Creating an Independent Living Plan (with Link to NYTD)

Complete the steps in this section to create an **Independent Living Plan (ILP)** with a link to the **National Youth in Transition Database (NYTD)**.

Navigating to the Independent Living Records Screen

1. From the Ohio SACWIS **Home** screen, click the **Case** tab.
2. Click the **Workload** tab.
3. Select the appropriate **Case ID** link.



The **Case Overview** screen appears.

4. Click the **Independent Living** link in the **Navigation** menu.

Creating an Independent Living Plan (ILP)

Home Intake **Case** Provider Financial Administration

Workload Court Calendar Placement Requests

< >

Case Overview

- Activity Log
- Attorney Communication
- Intake List
- Forms/Notices
- Substance Abuse Screening
- Ongoing Case A/I
- Specialized A/I Tool
- Law Enforcement
- Justification/Waiver
- Case Services
- Legal Actions
- Legal Custody/Status
- Living Arrangement / Guardianship
- Initial Removal
- Potential Adoptive Families
- Child Recruitment
- Pre-Adoptive Staffing/Matching Conference
- Placement/ICCA
- Residential Treatment Information
- Independent Living**
- Case Plan Tools
- Visitation Plans

CASE NAME / ID: **Adoption**
Sacwis, Susie / 123456
Open (11/21/2022)

ADDRESS: 123 Test Rd
Test, Oh 12345

CONTACT:

AGENCY:
Test County Children Services Board

PRIMARY WORKER: Test Worker
Assign Worker

SUPERVISOR(S): Test Supervisor

Case Actions

[View Member Details](#) | [Access Original Case](#) | [Program Categories](#) | [Case Status History](#) | [View Adoption Subsidies](#)

Action Items	Case Alerts	Dashboard	Assignments / Eligibility
Result(s) 1 to 15 of 100 / Page 1 of 7			
06/02/2022	1 Child Recruitment Plan is required for for Person Name / ID:		Actions... ▾
06/09/2022	1 7 day face-to-face must be made with child in placement Person Name / ID: . Location / Contact ▾		Actions... ▾

The **Independent Living Filter Criteria** screen appears displaying the **Independent Living Records** grid. The grid displays all Independent Living, Final Transition, and Emancipated Youth Plans for any Active or Inactive Case Member on the current case.

Note: If the Case Category is Adoption, the system will only display the Independent Living, Final Transition, and Emancipated Youth Plans for the Adoption Case Participants (excluding A/I Members).

Creating an Independent Living Plan (ILP)

CASE NAME / ID: **Sacwis, Suse / 123456** Adoption
Open (11/21/2022)

Independent Living | Credit Reports

Independent Living Filter Criteria

Youth Name: Plan Type:

Plan Developed Date: -
From Date To Date

Sort Results By: Show Plans for Inactive Members

Filter **Clear Form**

Independent Living Records

Youth Name	Plan Type	Plan Developed Date	Plan Closed Date	Agency
------------	-----------	---------------------	------------------	--------

Plan Type: * Youth Name: * **Add Plan**

In the **Independent Living Records** section:

5. In the **Plan Type** field, select **Independent Living Plan** from the drop-down list. (Required)
6. In the **Youth Name** field, select the appropriate name from the drop-down list. (Required)
7. Click the **Add Plan** button.

Independent Living Records

Youth Name	Plan Type	Plan Developed Date	Plan Closed Date	Agency
------------	-----------	---------------------	------------------	--------

Plan Type: * Youth Name: * **Add Plan**

The **Independent Living** screen appears. The system defaults to the **Independent Living** tab.

Creating an Independent Living Plan (ILP)

CASE NAME / ID: **Sacwis, Susie / 123456** Adoption / Open (11/21/2022)


Youth Name: **Sacwis, Susie** DOB: 07/03/2009 Gender: Female

Independent Living Goals Readiness Review Contact Directory Signatures

Independent Living

Agency: **Test County Children Services Board** Plan Type: **Independent Living Plan**

Assessment Information

IL Skills Assessment Completed: * Date Assessment Completed: 
Assessment Tool Used:

Completing the Independent Living Tab

Complete the fields in the **Assessment Information** section:


1. Select the appropriate value in the **IL Skills Assessment Completed** field. (Required)
2. Enter the **Date Assessment Completed**. (Required)
3. In the **Assessment Tool Used** field, select the assessment tool your county used. (Optional)

Independent Living Goals Readiness Review Contact Directory Signatures

Independent Living

Agency: **Test County Children Services Board** Plan Type: **Independent Living Plan**

Assessment Information

IL Skills Assessment Completed: * Date Assessment Completed: 
Assessment Tool Used:
Input was received from the Youth when completing:
Input was received from the Youth Case Manager when completing:
Input was received from the Youth's Substitute Caregiver when completing:

Creating an Independent Living Plan (ILP)

- If you selected **Other** in the previous step, you must enter an explanation in the field **If using other tool, explain**.

Assessment Tool Used:

If using other tool, explain:

- Select the appropriate values to indicate whether **Input was received from the Youth**, the **Case Manager**, and the **Substitute Caregiver** when completing the assessment. (Optional for "Pending" status; required to mark the plan as Active)
- If you selected **Yes** for input from the Case Manager, you must enter the **Name of Case Manager**.
- If you selected **Yes** for input from the Substitute Caregiver, you must enter the **Name of Substitute Caregiver**.

Input was received from the Youth when completing:

Input was received from the Youth Case Manager when completing:

Name of Case Manager:

Input was received from the Youth's Substitute Caregiver when completing:

Name of Substitute Caregiver:

In the **Plan Information** section:

- Select the appropriate values to indicate whether **Input was received from the Youth**, the **Case Manager**, the **Significant Other(s)**, and the **Substitute Caregiver** when completing the plan. (Optional for "Pending" status; required to mark the plan as Active)
- If you selected **Yes** for input from the Case Manager, you must enter the **Name of Case Manager**.

Plan Information

Input was received from the Youth when completing:

Input was received from the Youth Case Manager when completing:

Name of Case Manager:

Creating an Independent Living Plan (ILP)

10. If you selected **Yes** for input from the Significant Other(s), you must enter the **Name of Significant Other(s)**.

11. If you selected **Yes** for input from the Substitute Caregiver, you must select the **Name of Substitute Caregiver** from the drop-down list.

Input was received from the Significant Other(s) in the Youth's life:	Yes ▾
Name(s) of Significant Other(s):	Test Significant Other





Input was received from the Youth's Substitute Caregiver when completing:	Yes ▾
Name of Substitute Caregiver:	Test Caregiver ▾

12. Enter the **Plan Developed Date**. (Optional for "Pending" status; required to mark the plan as Active)

13. Select the appropriate value from the **Youth is currently receiving IL Services/Training** drop-down list. (Optional for "Pending" status; required to mark the plan as Active)

14. Enter the **Date Referred/Emancipated**. (Optional for "Pending" status; required to mark the plan as Active)

15. Enter the **Anticipated Emancipation Date**. (Optional)

Plan Developed Date:	08/23/2023 	Youth is currently receiving IL Services/Training:	<input type="text"/>
Date Referred / Emancipated:	<input type="text"/> 	Anticipated Emancipation Date:	<input type="text"/> 
Plan Closed Date:	<input type="text"/> 		

Status:	Pending ▾	Apply	Save	Cancel
---------	-----------	-------	------	--------

16. The **Status** field defaults to **Pending**. Keep that status.

17. Click the **Apply** button at the bottom of the screen.

A message appears showing your data has been saved.

Creating an Independent Living Plan (ILP)

Completing the Goals Tab

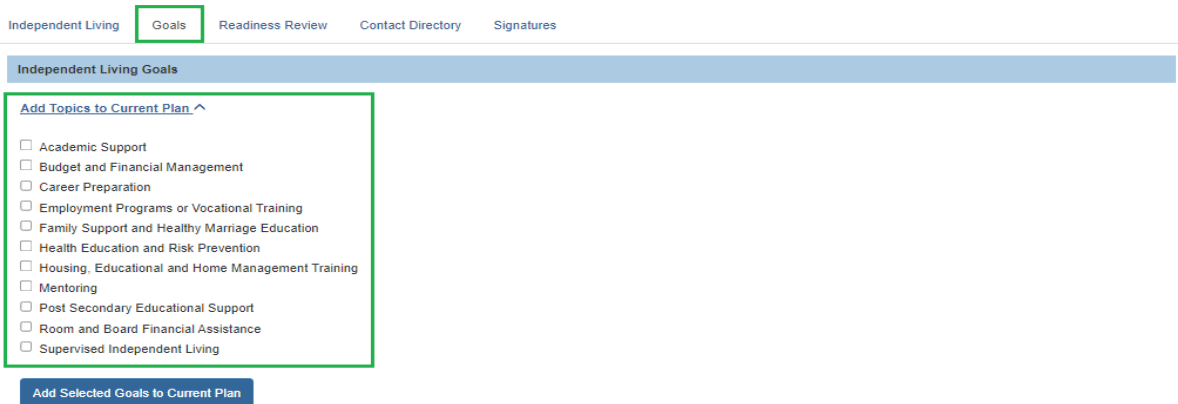
To add goals for the youth's independent living plan, complete the following steps.

Note: At least one goal must be entered to set the plan to **Active** status.

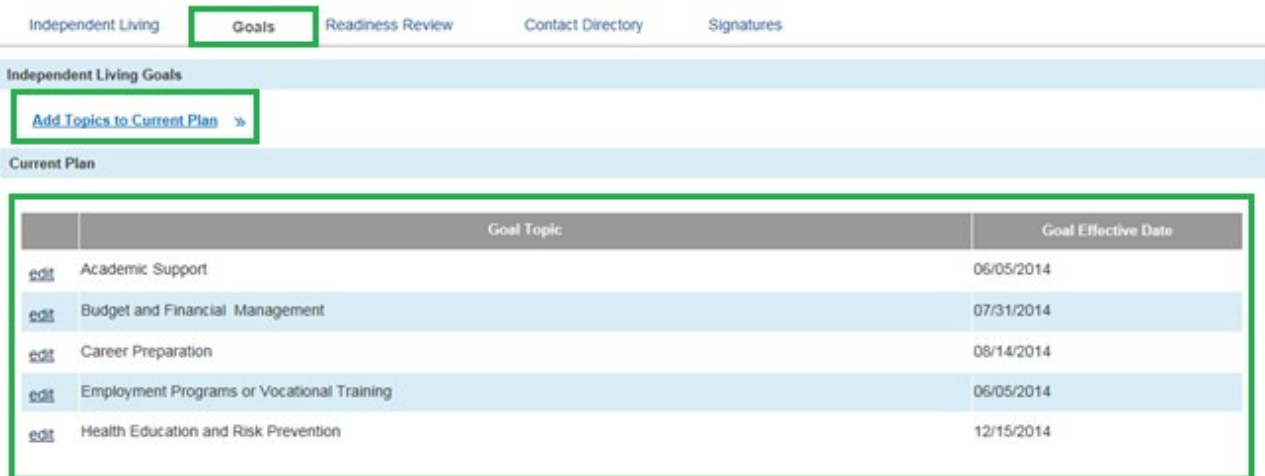
1. Click the **Goals** tab.

The **Independent Living Goals** screen appears.

- If the plan has no goals yet, the **Add Topics to Current Plan** hyperlink is expanded to display the list of goals:



- If any goals have already been added to the plan, the **Add Topics to Current Plan** hyperlink is collapsed, and the added goals display in the **Current Plan** section:



Creating an Independent Living Plan (ILP)

2. In the **Independent Living Goals** section, click the checkbox beside each goal you wish to add to the plan.

Note: If needed, click the **Add Topics to Current Plan** hyperlink to display the list of goals.

Independent Living Goals

[Add Topics to Current Plan ^](#)

- Academic Support
- Budget and Financial Management
- Career Preparation
- Employment Programs or Vocational Training
- Family Support and Healthy Marriage Education
- Health Education and Risk Prevention
- Housing, Educational and Home Management Training
- Mentoring
- Post Secondary Educational Support
- Room and Board Financial Assistance
- Supervised Independent Living

[Add Selected Goals to Current Plan](#)

3. Click the **Add Selected Goals to Current Plan** button.

The selected goals display in the **Current Plan** section.

	Goal Topic	Goal Effective Date
edit	Academic Support	08/23/2023

4. To add details for a goal, click the **Edit** button beside the goal.

The **Goal Details** screen appears.

Creating an Independent Living Plan (ILP)

5. In the **Goal Effective Date** field, the date pre-populates. (Required)

Goal Details

Goal Topic: Academic Support

Goal Effective Date: * 08/23/2023

Program and Life Skills Details

Link Service

6. Click the **Link Service** button to link a service provider who is currently addressing the youth's goal. (Required)

The **Case Services Filter Criteria** screen appears displaying the **Case Services** section.

7. Add case services as needed. You must add at least one case service to save the Goal Details record.

Case Services

Service: Add Case Services

Result(s) 0 / Page 0 of 0

OK Cancel

The **Service Information** screen appears.

8. Select the **Effective Date**.
9. Make a selection from the **Service Category** drop-down menu.
10. Make a selection from the **Service Type** drop-down menu.
11. Select the **Case Member Name** from the drop-down menu.
12. Click **Add Status/Provider**

Service Information

Agency: Test County Children Services Board

Risk Contributors: None

Effective Date: * 08/23/2023 Estimated Service End Date:

Service Category: * Education & Training Service Type: * After School Services

Member Service Status History

Current Status All Statuses

Case Member	Status	Provider	Service Description	Provider Address	Status Begin Date/End Date	Created in Error
Case Member Name: * Sacwis, Susie						

Add Status / Provider

The **Status Details** screen appears.

Creating an Independent Living Plan (ILP)

13. Make a selection from the **Status** drop-down menu.
14. Select the **Status Begin Date**.
15. Click the **Link Provider** button.

Status Details

Case Member Name: Sacwis, Susie

Service Category: Education & Training

Service Type: After School Services

Status: * Provided

Status Begin Date: * 08/23/2023

Status End Date:

End Reason:

Secondary End Reason:

Participation Frequency

Expected Participation Frequency	How Long	Start Date	End Date
----------------------------------	----------	------------	----------

Add Frequency

Provider Information

Provider	Provider Address
----------	------------------

Link Provider

The **Search For Provider Match** screen appears.

If you know the **Provider ID**, you may insert it on this screen. You may search for the Provider by **Name**, **School District** and by **County**.

16. To search by County, Add the appropriate **County** by selecting the county and clicking the **Add** button. This moves the county into Selected Counties.

Search For Provider Match

Service Category: Education & Training

Service Type: After School Services

Search Date: 08/23/2023

With Available Vacancies

Child has a kinship relationship with the provider

Available Counties:

Blue County

Green County

Red County

Pink County

Yellow County

Purple County

Orange County

Selected Counties:

Test County

17. Click **Search** at the bottom on the screen.

The **Search Results** screen appears.

Creating an Independent Living Plan (ILP)

18. Select the appropriate **Provider**.

Search Results

View Results in Map Collapse Services Expand Services

Result(s) 1 to 11 of 11 / Page 1 of 1 Results per page: 15 Go

Provider Name / ID	Provider Category	Provider Status	Current Primary Address	Current Vacancies
view Test, Provider 456789	NONODJFS	ACTIVE		

[View Services ^](#)

Test County Children Services Board:

[select](#) Family Counseling

The **Status Details** screen appears.

The **Provider** you selected is now with in the **Provider Information** grid.

19. Click the **Save** button at the bottom on the screen.

Status Details

Case Member Name: Sacwis, Susie
Service Category: Counseling
Status: * Scheduled
Status Begin Date: * 08/01/2023
End Reason:
Service Type: Family Counseling
Status End Date:
Secondary End Reason:
* The following end information will only be saved if an end date is entered

Participation Frequency

Expected Participation Frequency	How Long	Start Date	End Date
----------------------------------	----------	------------	----------

Add Frequency

Provider Information

Provider	Provider Address
view Test, Provider / 456789	unlink

Link Provider

Service Goal History

Service Goal	Effective Date
--------------	----------------

Add Service Goal

Comments:

Spell Check Clear 4000

Created in Error

Apply to Other Members

Save Cancel

Creating an Independent Living Plan (ILP)

The **Service Information** screen appears.

The **Service** is saved within the **Member Service Status History** grid.

20. Click the **Save** button.

Service Information

Agency: Test County Children Services Board
Risk Contributors: None

Effective Date: * 08/23/2023 Estimated Service End Date:

Service Category: * Counseling Service Type: * Family Counseling

Member Service Status History

Current Status All Statuses

Case Member	Status	Provider	Service Description	Provider Address	Status Begin Date/End Date	Created in Error
edit Sacwis, Susie / 123456	Scheduled	Test, Provider	Family Counseling		08/23/2023	

Case Member Name: *

The **Goal Details** screen appears.

21. In the **Comments** text box, enter narrative regarding the case services. (Optional)

Goal Details

Goal Topic: Academic Support

Goal Effective Date: * 08/23/2023

Program and Life Skills Details

Comments: (Action Steps, Summary, etc.)

22. In the **Completion Details** section, if the youth's goal has been achieved, click the **Yes** radio button. Otherwise, keep the radio button default setting at **No**. (Required)

23. If you selected **Yes**, you must enter a date in the **Completion Date** field.

24. If you selected **Yes**, you must enter narrative in the **Explain** text box.

Creating an Independent Living Plan (ILP)

Completion Details

Has the goal been achieved? Yes No

Completion Date: 08/23/2023

TEST

Explain: ✓ ABC

1996

Created in Error

Created By: Created Date: Aug 23, 2023 11:19:39 AM

Modified By: Modified Date: Aug 23, 2023 12:15:36 PM

Save Cancel

25. When complete, click the **Save** button at the bottom of the screen.

The **Goals** tab appears.

26. Repeat the previous steps for all **Goal Topics**.

27. When complete, click the **Apply** button at the bottom of the screen.

Independent Living **Goals** Readiness Review Contact Directory Signatures

Independent Living Goals

[Add Topics to Current Plan](#) ▾

Current Plan

	Goal Topic	Goal Effective Date
Completed Goals		
view	Academic Support	08/23/2023
view	Career Preparation	08/23/2023

Status: Pending ▾ **Apply** Save Cancel

Creating an Independent Living Plan (ILP)

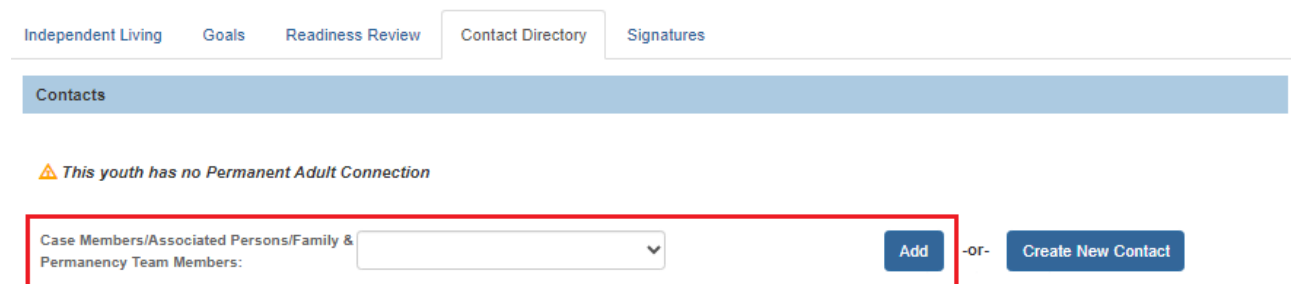
Completing the ILP Contact Directory Tab

To add contacts for the youth's independent living plan, complete the following steps.

Note: At least one contact must be entered to set the plan to **Active** status.

1. Click the **Contact Directory** tab.

The **Youth Contacts** screen appears.



The screenshot shows the 'Youth Contacts' screen with the 'Contact Directory' tab selected. A dropdown menu is open for 'Case Members/Associated Persons/Family & Permanency Team Members' with an 'Add' button next to it. A 'Create New Contact' button is also visible.

2. If the contact is a Case Member or Associated Person on the case, select the name of the contact from the **Case Members/Associated Persons** drop-down list.
 - OR if the contact person you wish to add is not listed in the drop-down, skip to **Step 9** below.
3. Click the **Add** button.

The person is added to the **Youth Contacts** grid:




The screenshot shows the 'Youth Contacts' grid with a newly added contact named 'Test - Sister'. The contact has an 'edit' link and an 'ACTIVE' status. The contact details are: Primary Contact: Test Contact, Other Contact Info: Business hours only, Permanent Adult Connection: No.

4. Click the **Edit** link beside the newly added contact.

The **Contact Details** screen appears displaying details for the contact person.

5. If this adult has a permanent connection to the child, click the checkbox beside **This contact is a permanent adult connection**. (Optional)
6. Select if this adult is a **Youth Support Person**. (Optional)

Hint: Hover your mouse pointer over the Information icon  for the definition of a permanent adult connection.

Creating an Independent Living Plan (ILP)

7. Select Yes or No if you want to make this person an active Family & Permanency Team Member. (Required)

Contact Details

Contact Name: * Test, Adult Clear Person

Relationship to Youth: * Grandfather ▼

This contact is a Permanent Adult Connection ?

Youth Support Person ?

Contact Address: 123 Test Rd.
Test Oh 12345

Contact Type: Cell: (123) 456-7890

Home:

Do you want to make this person an active Family & Permanency Team Member? * Yes ▼

Other Contact Information: [\(expand full screen\)](#)

✓ ABC
2000

Save Cancel

8. Enter narrative in the **Other Contact Information** text box, if applicable. (Optional)
9. When complete, click the **Save** button to return to the **Youth Contacts** screen.
10. Repeat these steps to add another contact, if applicable.

Note: If a Signature has not been added for this contact, you can click the **Delete** button to delete the contact.

11. If the contact you wish to add is not listed in the **Case Members/Associated Persons** drop-down list, click the **Create New Contact** button.

Creating an Independent Living Plan (ILP)

Independent Living Goals Readiness Review **Contact Directory** Signatures

Contacts

 This youth has no Permanent Adult Connection

Case Members/Associated Persons/Family & Permanency Team Members:

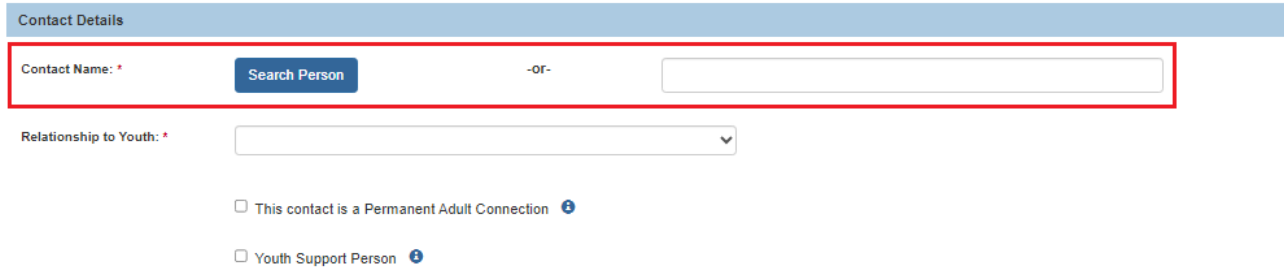
Add

-or-

Create New Contact

The **Contact Details** screen appears.

12. In the **Contact Name** field, click the **Search Person** button to search/select the Person OR enter the name of the person in the text box. (Required)



Contact Details

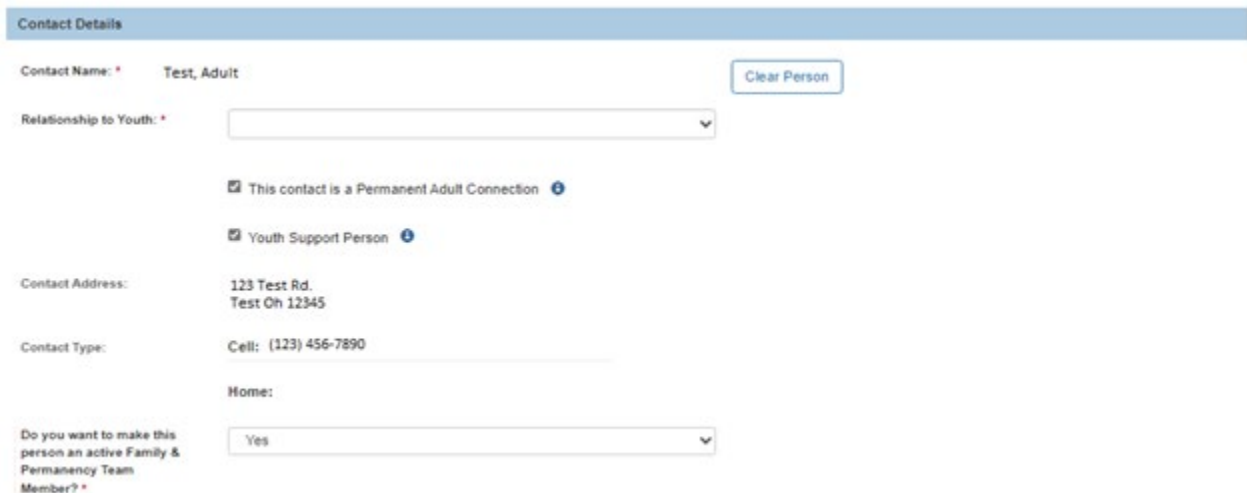
Contact Name: * **Search Person** -or-

Relationship to Youth: *

This contact is a Permanent Adult Connection ⓘ

Youth Support Person ⓘ

If you Search and select a person, the **Contact Details** screen displays details for the selected person:



Contact Details

Contact Name: * Test, Adult **Clear Person**

Relationship to Youth: *

This contact is a Permanent Adult Connection ⓘ

Youth Support Person ⓘ

Contact Address: 123 Test Rd.
Test Oh 12345

Contact Type: Cell: (123) 456-7890


Home:

Do you want to make this person an active Family & Permanency Team Member? *

Note: If the selected person is not the correct contact, you can click the **Clear Person** button to unlink the person from this contact record and display the **Search Person** button again.

Creating an Independent Living Plan (ILP)

13. Select this person's relationship to the youth from the **Relationship to Youth** drop-down list. (Required)
14. If this adult has a permanent connection to the child, click the checkbox beside **This contact is a Permanent Adult Connection**. (Optional)
15. If this adult is a **Youth Support Person**, click the checkbox. (Optional)
16. Select **Yes** or **No** if you want to make this person an active **Family & Permanency Team Member**. (Required)

Hint: Hover your mouse pointer over the Information icon  for the definition of a permanent adult connection.

Important: At least **one** of the following is **Required** to save this Contact record. These fields are described in the Steps 13-15 below.

- **Contact Address** field, and/or
- **Contact Type / Contact** fields, and/or
- **Other Contact Information** field.

17. The **Contact Address** field displays the **Search Address** button if you did not Search/select a person above. Click the **Search Address** button if you wish to Search and select the person's **Contact Address**. (Optional)

If you Search and select an address, the **Contact Address** field displays the address details and a **Remove Address** button:



The screenshot shows a form with two main sections. The top section is labeled 'Contact Address:' and contains the text '123 Test Rd', 'Test, Oh 12345', and a blue button labeled 'Remove Address'. The bottom section is labeled 'Contact Type:' and contains a dropdown menu with a downward arrow, followed by the label 'Contact:' and an empty text input field. Both sections are enclosed in a red rectangular border.

Note: If the selected address is not the correct address, you can click the **Remove Address** button to unlink the address from this contact record and display the **Search Address** button again.

18. Entry fields for **Contact Type**, **Contact**, and **Ext** display if you did not Search/select a person above. Complete these fields as described below. (Optional)
 - a. Select the appropriate **Contact Type** from the drop-down list if you are entering a phone number, email address, social media handle/account, etc.
 - b. In the **Contact** field, enter the phone number, email address, etc.

Creating an Independent Living Plan (ILP)

- c. If you selected Phone Number as the Contact Type, enter the phone extension in the **Ext** field, if applicable.

19. Enter contact information in the **Other Contact Information** text box, if applicable. (Optional)

20. Click the **Save** button at the bottom of the screen.

The screenshot shows a text input field labeled "Other Contact Information: (expand full screen)". To the right of the field are two buttons: a blue button with a checkmark and "ABC" and a grey button with "2000". Below the field is a dark grey bar containing a blue "Save" button and a white "Cancel" button.

The **Youth Contacts** screen appears displaying the new contact in the grid.

The screenshot shows a navigation bar with tabs: "Independent Living", "Goals", "Readiness Review", "Contact Directory" (highlighted with a green box), and "Signatures". Below the navigation bar is a "Contacts" section. A contact entry is shown with the following details: "Test, Adult - Grandfather" with an "edit" link and an "ACTIVE" toggle switch. Below the name, the contact information is listed: "Primary Contact: (123) 456-7890", "Other Contact Info: TEST", "Permanent Adult Connection", and "Youth Support Person".

21. Repeat the steps in this sub-section for each contact you wish to add.

22. When complete, click the **Apply** button at the bottom of the screen.

Important: After the **Independent Living** tab has been completed, at least one **Goal** has been added, and at least one **Contact** has been added, the ILP can be marked as **Active**.

To do so, complete the steps in the **Marking the Independent Living Plan as Active** section in this Knowledge Base Article or complete the remaining tabs as discussed in each sub-section.

Creating an Independent Living Plan (ILP)

Completing the ILP Signatures Tab

To add signatures for the youth's independent living plan, complete the following steps.

1. Click the **Signatures** tab.

The **Signatures Captured** screen appears. The screen is pre-populated with the Youth, the IL Worker, and the IL Worker's Supervisor (if assigned to the case).

Independent Living Goals Readiness Review Contact Directory **Signatures**

Signatures Captured		
Sacwis, Susie - Youth	Primary Contact:	Date Signed: <input type="text"/>
Worker - Assigned Worker	Primary Contact: (123) 456-7890	Date Signed: <input type="text"/>
Worker - Supervisor	Primary Contact: (123) 456-7890	Date Signed: <input type="text"/>

Add Plan Participant **Search Person**

2. To add a signature for a person who is already a participant on the Independent Living Plan, click the **Add Plan Participant** button.
 - OR click the **Search Person** button to search/select a person, then skip to **Step 5** below.

The **Available Persons** screen appears as shown on the next page. This screen displays the list of plan participants you can select. The list includes active Case Members, Associated Persons, Assigned Workers, home Placement Providers, Unassigned IL Workers for the associated agency, and Youth Contacts. This list does not include persons who have already been selected.

Creating an Independent Living Plan (ILP)

- Click the checkbox beside each person you wish to select OR click the checkbox in the grid header to select **All** persons in the list.

Available Persons

- Test, Provider/45678 - Placement Provider
- Test, Youth Contact/7899 - Youth Contact
- Test, Worker/11111 - Assigned Worker

Save Cancel

- Click the **Save** button.

- The **Signatures Captured** screen appears displaying the selected person(s).

CASE NAME / ID: Sacwis, Susie / 123456 Adoption / Open (11/21/2022)

Youth Name: Sacwis, Susie DOB: 07/03/2009 Gender: Female

Independent Living Goals Readiness Review Contact Directory Signatures

Signatures Captured

Sacwis, Susie - Youth	Primary Contact:	Date Signed: <input type="text"/>
Test - Assigned Worker	Primary Contact:	Date Signed: <input type="text"/>

Add Plan Participant Search Person

Status: Pending

- In the **Date Signed** field beside each person, enter the date the signature was recorded.
- If you selected an incorrect person, click the **Delete** icon beside the person to delete the signature entry (shown in blue above).

Note: The Youth's signature cannot be deleted.

- When complete, click the **Apply** button.

A message appears stating your data has been saved.

Creating an Independent Living Plan (ILP)

Marking the Independent Living Plan as Active

To mark the **Independent Living Plan** as **Active**, the following is required:

1. Required fields on the **Independent Living** tab must be completed, AND
2. One **Goal** must be created and saved, AND
3. At least one **Contact** record must be saved.

The following fields on the **Independent Living** tab are required to save an ILP as **Active**:

- **Plan Developed Date**
- **Date Referred/Emancipated**
- **IL Skills Assessment Completed**
- **Assessment – Input was received from the Youth when completing**
- **Assessment – Input was received from the Youth’s Case Manager when completing**
 - **Assessment – Name of Case Manager** is also required when “Yes” is selected for “Input was received from the Youth’s Case Manager when completing”
- **Assessment – Input was received from the Youth’s Substitute Caregiver when completing**
 - **Assessment – Name of Substitute Caregiver** is also required when “Yes” is selected for “Input was received from the Youth’s Substitute Caregiver when completing”
- **Plan – Input was received from the Youth**
- **Plan – Input was received from the Youth’s Case Manager when completing**
 - **Plan – Name of Case Manager** is also required when “Yes” is selected for “Input was received from the Youth’s Case Manager when completing”
- **Plan – Input was received from the Significant Other(s) in the Youth’s life**
 - **Plan – Name(s) of Significant Other(s)** is also required when “Yes” is selected for “Input was received from Significant Other(s) in the Youth’s life”
- **Plan – Input was received from the Youth’s Substitute Caregiver when completing**
 - **Plan – Name of Substitute Caregiver** is also required when “Yes” is selected for “Input was received from the Youth’s Substitute Caregiver when completing”
- **Youth is currently receiving IL Services/Training**

Creating an Independent Living Plan (ILP)

Complete the following steps to mark the ILP as Active:

1. When all information has been added (or at least the minimum information as described above), click the **Independent Living** tab.
2. In the **Status** field, select **Active** from the drop-down list.
3. Click the **Save** button.

Independent Living | Goals | Readiness Review | Contact Directory | Signatures

Independent Living

Agency: Test County Children Services Board | Plan Type: Independent Living Plan

Assessment Information

IL Skills Assessment Completed: * Yes

Date Assessment Completed: 08/23/2023

Assessment Tool Used: Other

If using other tool, explain: Test

Input was received from the Youth when completing: Yes

Input was received from the Youth Case Manager when completing: Yes

Name of Case Manager: Test

Input was received from the Youth's Substitute Caregiver when completing: Yes

Name of Substitute Caregiver:

Status: Active | Apply | Save | Cancel

The record is saved with an **Active** status and the **Independent Living Filter Criteria** screen appears displaying the **Independent Living Records** grid.

Independent Living Records

	Youth Name	Plan Type	Plan Developed Date	Plan Closed Date	Agency	
edit	Test, Child	Independent Living Plan Status: Active	08/23/2023		Test County Children Services Board	 NYTD

Creating an Independent Living Plan (ILP)

Completing the Readiness Review Tab

You can add a Readiness Review to an Independent Living Plan after the plan has been set to **Active** status.

1. Click the **Readiness Review** tab.

The **Independent Living Readiness Review** screen appears.

Independent Living Goals **Readiness Review** Contact Directory Signatures

Independent Living Readiness Review

Review Date	Narrative
-------------	-----------

Add Readiness Review

2. Click the **Add Readiness Review** button.

The **Readiness Review Details** screen appears.

Readiness Review Details

Review Date: *

Have you reviewed/updated the Youth's Contact Directory? *

Are the Youth's Permanent Adult Connection(s) the same? *

Narrative: * [\(expand full screen\)](#)

3. Enter the **Review Date**. (Required)

Note: Each review must have a date that falls after the previous review date.

4. Select the appropriate value to answer the question: **Have you reviewed/updated the Youth's Contact Directory?** (Required)
5. Select the appropriate value to answer the question: **Are the Youth's Permanent Adult Connection(s) still the same?** (Required)

Creating an Independent Living Plan (ILP)

6. Complete the **Narrative** field. (Required)
7. Click the **Save** button.

The **Independent Living Readiness Review** screen appears displaying the information in the grid.

Review Date	Narrative
08/24/2023	TEST

Printing the Independent Living Plan Report

When the Independent Living Plan is complete, following the steps below to print a report for the child.

1. Navigate to the **Independent Living Records** screen using the steps previously discussed.
2. Click the **Report** icon beside the appropriate Independent Living Plan.

Youth Name	Plan Type	Plan Developed Date	Plan Closed Date	Agency
Test, Child	Independent Living Plan Status: Active	08/23/2023		Test County Children Services Board

The **Available Documents** screen appears.

3. In the **Generate Document** field, select **Independent Living Plan Summary**.

Generate Document: Independent Living Plan Summary

Creating an Independent Living Plan (ILP)

4. Click the **Select** button.

The **Document Details** screen appears.

Document Details

Document Category: Document Title: Independent Living Plan Summary

Work-Item ID: Work-Item Reference:

Task ID: Task Reference: Independent Living Plan

Document History

ID	Date Created	Employee ID	Name
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Document History

[Generate Report](#)

5. Click the **Generate Report** button.

Completing the NYTD Survey Details

1. Navigate to the **Independent Living Records** screen using the steps previously discussed.
2. Click the **NYTD** link in the grid row of the youth.

Residential Treatment Information

[Independent Living](#)

Case Plan Tools

Visitation Plans

Review Tools

Family Team Meeting

Case Conference Note

Human Trafficking

Child Fatality/Near Fatality

ICPC

Pre-Finalization Information

Finalization Checklist

Filter Clear Form

Independent Living Records

Youth Name	Plan Type	Plan Developed Date	Plan Closed Date	Agency	NYTD
edit Test, Child	Independent Living Plan Status: Active	08/23/2023		Test County Children Services Board	NYTD

If a NYTD account has not been created, the **NYTD Account Details** screen appears.

3. Verify that the required field information is correct.
 - The **Effective Date** field defaults to the current system date.

Creating an Independent Living Plan (ILP)

NYTD Account Details

Effective Date: 08/24/2023

First Name: Susie DOB: 07/03/2009

Last Name: Sacwis SSN: XXX-XX-XXXX

NYTD ID:

Youth was informed that they may be a part of the NYTD cohort study: *

NYTD Survey Log In: <https://nytd.ohio.gov/nytd/login.do>

Note: This Youth has been adopted therefore the youth may have a different name than what is displayed on this record. For further assistance please contact the youth's Adoption Worker.

Generate NYTD Account Close

4. If the required information is missing or incorrect, click the **Close** button and go to the appropriate **Person** tab to enter the required information. Once the information is correct, navigate back to the **NYTD Account Details** screen.
5. Select the appropriate value from the drop-down list for the field: **Youth was informed that they may be a part of the NYTD cohort study**. (Required)
6. When complete, click the **Generate NYTD Account** button.

A NYTD Account is generated for the youth and the **NYTD Survey** tab (**NYTD Survey Details** screen) appears.

NYTD Survey Contact Directory NYTD Account

NYTD Survey Details

17 Year Survey	Survey is not yet available as Youth is not 17 years old.
19 Year Survey	Survey is not yet available for Youth.
21 Year Survey	Survey is not yet available for Youth.

Note: This Youth has been adopted therefore the youth may have a different name than what is displayed on this record. For further assistance please contact the youth's Adoption Worker.

Important: Youth cannot access the NYTD survey until the **NYTD Account** has been generated.

Completing the NYTD Survey Contact Directory Tab

1. To add contacts for the NYTD Survey, click the **Contact Directory** tab.

The **Contact Directory** tab appears displaying the **Youth Contacts** section.

Creating an Independent Living Plan (ILP)

The screenshot shows the 'Contact Directory' tab selected in a navigation bar. Below the navigation bar is a blue header labeled 'Contacts'. A warning message states: '⚠ This youth has no Permanent Adult Connection'. Below this is a dropdown menu for 'Case Members/Associated Persons/Family & Permanency Team Members:' with an 'Add' button to its right. To the right of the dropdown is a '-or-' separator and a 'Create New Contact' button.

2. This tab looks and functions the same as the **Contact Directory** tab for the **Independent Living Plan**. Refer to the **Completing the ILP Contact Directory Tab** section of this Knowledge Base Article for instructions to add or edit contacts.

Note: The NYTD **Contact Directory** tab is always editable, regardless of case status.

Adding an Outcome Response for an Uncompleted Survey

Complete the following steps to add an **Outcome Response Reason** when the youth did not complete a NYTD Survey.

1. Navigate to the **Independent Living Records** screen using the steps previously discussed.
2. Click the **NYTD** link in the grid row of the youth.

The **NYTD Survey** tab (**NYTD Survey Details** screen) appears.

The screenshot shows the 'NYTD Survey Details' screen with the 'NYTD Survey' tab selected. It displays a table of surveys. The first row is for a '17 Year Survey' with a status of 'Completed On Time: No' and a red 'Add Outcome Response' button highlighted with a red box. The second row is for a '19 Year Survey' with the status 'Survey is not yet available for Youth.' The third row is for a '21 Year Survey' with the same status.

3. Click the **Add Outcome Response** button.

The **Survey Outcome Details** screen appears.

Creating an Independent Living Plan (ILP)

Survey Outcome Details

Age of Youth: 17

Reason NYTD Survey was not completed: *

Effective Date: *

Comments: [\(expand full screen\)](#)

Save Cancel

4000

4. In the **Reason NYTD Survey was not completed** field, select the appropriate reason from the drop-down list. (Required)
5. Enter the **Effective Date**. (Required)
6. Enter narrative in the **Comments** text box, if applicable. (Optional)
7. Click the **Save** button.

The **NYTD Survey Details** screen appears.

Editing an Outcome Response

1. Navigate to the **Independent Living Records** screen using the steps previously discussed.
2. Click the **NYTD** link in the grid row of the youth.

Residential Treatment Information

Independent Living

Case Plan Tools

Visitation Plans

Review Tools

Family Team Meeting

Case Conference Note

Human Trafficking

Child Fatality/Near Fatality

ICPC

Pre-Finalization Information

Finalization Checklist

Filter Clear Form

Independent Living Records

Youth Name	Plan Type	Plan Developed Date	Plan Closed Date	Agency
edit Test, Child	Independent Living Plan Status: Active	08/23/2023		Test County Children Services Board

NYTD

The **NYTD Survey Details** screen appears.

Creating an Independent Living Plan (ILP)

3. Click the **Edit** link.

NYTD Survey | Contact Directory | NYTD Account

NYTD Survey Details

17 Year Survey	Completed On Time: No
edit	Outcome Response Reason: Youth Declined
19 Year Survey	Survey is not yet available for Youth.
21 Year Survey	Survey is not yet available for Youth.

Note: This Youth has been adopted therefore the youth may have a different name than what is displayed on this record. For further assistance please contact the youth's Adoption Worker.

The **Account Details** screen appears.

Survey Outcome Details

Age of Youth: 17

Reason NYTD Survey was not completed: * Youth Declined

Effective Date: * 01/01/2007

Comments: [\(expand full screen\)](#)

4000

Save Cancel

4. Modify the fields as appropriate.

5. Click the **Save** button.

The **NYTD Survey Details** screen appears showing the newly saved data.

Printing the NYTD Survey Information Letter

1. Navigate to the **Independent Living Records** screen using the steps previously discussed.
2. Click the **Report** icon beside the appropriate Independent Living Plan.

Creating an Independent Living Plan (ILP)

Residential Treatment Information

- Independent Living
- Case Plan Tools
- Visitation Plans
- Review Tools
- Family Team Meeting
- Case Conference Note
- Human Trafficking
- Child Fatality/Near Fatality
- ICPC
- Pre-Finalization Information
- Finalization Checklist

Filter Clear Form

Independent Living Records

Youth Name	Plan Type	Plan Developed Date	Plan Closed Date	Agency	
edit Test, Child	Independent Living Plan Status: Active	08/23/2023		Test County Children Services Board	 NYTD

The **Available Documents** screen appears.

3. In the **Generate Document** field, select **NYTD Survey Information Letter**.

Reports

Work-Item Type: CASE Work-Item Reference:

Task Type: IL Task Reference:

Available Documents

Generate Document: NYTD Survey Information Letter

Select Cancel

4. Click the **Select** button.

The **Document Details** screen appears.

Document Details

Document Category: Document Title: NYTD Survey Information Letter

Work-Item ID: Work-Item Reference:

Task ID: Task Reference:

Document History

ID	Date Created	Employee ID	Name
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Document History

Generate Report

5. Click the **Generate Report** button.

Creating an Independent Living Plan (ILP)

Creating a Final Transition Plan

Complete the following steps to create a **Final Transition Plan** (also known as a **Transition Plan**) for a child in an **Ongoing Case** or an **Adoption Case** who is within a few months of reaching age 18 and **Emancipating** out of the foster care system.

The following Business Rule relates to saving a Final Transition Plan:

“All date fields on the Necessary Documents tab are required upon the user saving a Plan Closed Date. Only one of these two fields are required upon user saving a FT Plan without a Plan Closed Date: ‘Date Youth received State Identification Card’ and ‘Date Youth received Driver’s License’. If the Person associated to the plan has an AWOL alert, these date fields on the Necessary Documents tab are not required.”

Navigating to the Final Transition Plan Screen

1. Navigate to the **Independent Living Records** screen as described previously.

In the **Independent Living Records** section:

1. In the **Plan Type** field, select **Final Transition Plan** from the drop-down list. (Required)
2. In the **Youth Name** field, select the appropriate name from the drop-down list. (Required)

The screenshot shows the 'Independent Living Records' interface. On the left is a navigation menu with 'Independent Living' selected. The main area contains a table with the following data:

	Youth Name	Plan Type	Plan Developed Date	Plan Closed Date	Agency	
edit	Sacwis, Susie	Independent Living Plan Status: Active	08/23/2023		Test County Children Services Board	NYTD

Below the table is a form with the following fields:

- Plan Type: * (Dropdown menu set to 'Final Transition Plan')
- Youth Name: * (Dropdown menu set to 'Sacwis, Susie')
- Add Plan button

3. Click the **Add Plan** button.

The **Final Transition Plan** screen appears displaying several tabs. The system defaults to the **Youth Information** tab as shown below.

Creating an Independent Living Plan (ILP)

Completing the Youth Information Tab

1. Select the appropriate response for the field: **The Youth would like to receive post emancipation services provided or arranged by the PCSA or PCPA from which the youth emancipated.** (Required)
2. Enter the **Plan Developed Date.** (Required)

Address: Test Address

Contact: (740) 123-4567

The Youth would like to receive post emancipation services provided or arranged by the PCSA or PCPA from which the youth emancipated: *

Plan Developed Date: *

Plan Closed Date: ⚠ Please update Youth's address at time of emancipation

Health

Anticipated health insurance at time of emancipation: No Health Insurance Provider Record(s)

[Add/Update Insurance Provider](#)

Health Care Provider

Test Provider - 123 Test Rd, Test OH 12345

Test Provider 2 - 456 Test Rd, Test OH 12345

3. The **Health** section displays the current Insurance Providers from the youth's Person record. If needed, click the **Add/Update Insurance Provider** link to add or update the insurance provider(s).

The **Health Care Provider** section displays current Health Care Providers listed on the **Treatment Details** for the youth.

Creating an Independent Living Plan (ILP)

The **Current Medication** section lists information about current medications for the youth.

4. Enter additional information in the **Other health related information** text box, if applicable. (Optional)

Current Medication

Test Medication - 100mg/day - Daily
Prescribed By: Dr. Test

Other health related information: [\(expand full screen\)](#)

[✓ ABC](#)
4000

Education

Highest grade Youth will complete:

Last School Attended: Eastern Elementary

What is the Youth's post-secondary education or training plan? Describe:

Has FAFSA been completed:

[FAFSA Information](http://www.fafsa.ed.gov) [ⓘ](http://www.fafsa.ed.gov) (<http://www.fafsa.ed.gov>)
[Department of Higher Education](https://ohiohighered.org) [ⓘ](https://ohiohighered.org) (<https://ohiohighered.org>)
[Education Training Voucher \(ETV\) Program](http://www.fc2success.org/programs/education-training-vouchers) [ⓘ](http://www.fc2success.org/programs/education-training-vouchers) (<http://www.fc2success.org/programs/education-training-vouchers>)

Go to Forms/Notices to generate the Application for Federal Student Aid letter

What has the youth identified as their educational or vocational needs and goals? [\(expand full screen\)](#)

[✓ ABC](#)
4000

Apply Save Cancel

5. Complete the fields in the **Education** section. (Optional)
6. If you select **Other** in the **What is the Youth's post-secondary education or training plan?** field, you must enter a description in the **Describe** field.

Note: You may click any of the provided hyperlinks—**FAFSA Information**, **Department of Higher Education**, and **Education Training Voucher (ETV) Program**—to display the related web site in a new window.

7. Click the **Apply** button.

Creating an Independent Living Plan (ILP)

Completing the Resources Tab

1. Click the **Resources** tab.

The **Final Transition Resources** screen appears displaying **Financial Information** and **Housing Information** sections.

2. The top portion of the **Financial Information** section displays the current employer(s) from the youth's Person record. If needed, click the **Update Employment Information** link to update the youth's employer(s).

Final Transition Resources

Financial Information

No Employment Information
[Update Employment Information](#)

Does the youth earn enough to pay bills?

Does the youth have a budget?

Does the youth have a checking account?

Does the youth have a savings account?

Does the youth have any outstanding court fees?

3. Select the appropriate values to answer the questions about the youth's earnings, budget, checking account, and savings account. (Optional)
4. If you selected **Yes** for a checking account, you may enter the **Bank Name and Information** related to the youth's checking account. (Optional)
5. If you selected **Yes** for a savings account, you may enter the **Bank Name and Information** related to the youth's savings account. (Optional)
6. If you selected **Yes** for any **Outstanding Court Fees**, you may enter the information related to the youths' fees. (Optional)

Creating an Independent Living Plan (ILP)

The screenshot shows a web form for creating an Independent Living Plan (ILP). It is divided into several sections:

- Checking Account Section:** A dropdown menu asks "Does the youth have a checking account?" with "Yes" selected. Below is a text area for "Bank Name and Information:" with a "✓ ABC" button and a "250" indicator.
- Savings Account Section:** A dropdown menu asks "Does the youth have a savings account?" with "Yes" selected. Below is a text area for "Bank Name and Information:" with a "✓ ABC" button and a "250" indicator.
- Court Fees Section:** A dropdown menu asks "Does the youth have any outstanding court fees?" with "Yes" selected. Below is a text area for "Describe:" with a "✓ ABC" button and a "250" indicator.
- Resources Section:** A text area labeled "Resources available to youth:" contains three checkboxes:
 - [Social Security Benefit Information](http://ssa.gov) (http://ssa.gov)
 - [County Job and Family Services Benefits ODJFS](http://odjfsbenefits.ohio.gov/SelfServiceSplash.jsf) (http://odjfsbenefits.ohio.gov/SelfServiceSplash.jsf)
 - Other (please specify)
- Obtaining a Credit Report Section:** A text area labeled "Obtaining a Credit Report:" contains three hyperlinks:
 - [Experian](http://www.experian.com) (http://www.experian.com) LAST PROVIDED
 - [TransUnion](http://www.transunion.com) (http://www.transunion.com) LAST PROVIDED
 - [Equifax](http://www.equifax.com) (http://www.equifax.com) LAST PROVIDED

7. Select the appropriate checkbox(es) to indicate the **Resources available to youth.** (Optional)

Note: You may click the hyperlink beside the **Social Security Benefit Information** checkbox and the **County Job and Family Services Benefits ODJFS** checkbox to display the related web site in a new window.

8. If you selected the **Other (please specify)** checkbox, you must enter a description in the text field.

The **Obtaining a Credit Report** field displays hyperlinks to the three main credit reporting agencies. The screen also displays a **LAST PROVIDED** date, which is the most recent Report Reviewed Date associated to the youth's Credit Report for each credit reporting agency (if applicable).

9. To obtain a credit report(s) for the youth, click the appropriate credit reporting agency link(s) in the **Obtaining a Credit Report** field. (Optional)

Creating an Independent Living Plan (ILP)

10. If the youth needs to register for selective service, click the **Selective Service System** hyperlink in the **Registering for selective service (males only)** field.

Note: The **Selective Service System** hyperlink displays only if the youth associated to the Final Transition Plan has a **Gender** code of **Male**.

11. Complete the **Housing Information** section. (Optional)

12. Click the **Save** button.

Which type of housing items have been requested by the youth?

	Requested	Provided
Rent:	<input type="checkbox"/>	<input type="checkbox"/>
Deposit:	<input type="checkbox"/>	<input type="checkbox"/>
Furniture:	<input type="checkbox"/>	<input type="checkbox"/>
Gas:	<input type="checkbox"/>	<input type="checkbox"/>
Electric:	<input type="checkbox"/>	<input type="checkbox"/>
Phone:	<input type="checkbox"/>	<input type="checkbox"/>
Internet:	<input type="checkbox"/>	<input type="checkbox"/>
Cable:	<input type="checkbox"/>	<input type="checkbox"/>
Water:	<input type="checkbox"/>	<input type="checkbox"/>
Trash Removal:	<input type="checkbox"/>	<input type="checkbox"/>
Other:	<input type="checkbox"/>	<input type="checkbox"/>

Other:

What has the youth identified as their employment, financial, or housing needs and goals? [\(expand full screen\)](#)
(Detail those resources requested by the youth and how they will be obtained/provided.)

Creating an Independent Living Plan (ILP)

Completing the Necessary Documents Tab

1. Click the **Necessary Documents** tab.

The **Record Information** screen appears.

The screenshot shows the 'Record Information' screen with the following elements:

- Navigation tabs: Youth Information, Resources, **Necessary Documents** (highlighted), Contact Directory, Signatures.
- Section header: Record Information
- Form fields (each with a calendar icon):
 - Date Youth received Original Birth Certificate:
 - Date Youth received Original Social Security Card:
 - Date Youth received State Identification Card:
 - Date Youth received Driver's License:
 - Date Youth received a copy of their health records:
 - Date Youth received a copy of their education records:
 - Date Health Care Power of Attorney reviewed:
 - Date Youth received letter verifying Emancipation from Agency Custody:
- Text: Go to Forms/Notices to generate the **Wardship Letter** (Verification of County Wardship)
- Additional Comments: [\(expand full screen\)](#)
- Bottom bar: Apply, Save, Cancel, ABC, 500

2. Enter dates in the relevant fields. One of the following dates is **required** when creating a Final Transition Plan:
 - **Date Youth received State Identification Card, OR**
 - **Date Youth received Driver's License.**
3. If you entered the **Date Youth received Driver's License**, you may select a value in the **Does the Youth have car insurance?** field. (Optional)
4. If you selected **Yes** in Step 3, you may enter the **Name of car insurance provider.** (Optional)

Creating an Independent Living Plan (ILP)

Date Youth received Driver's License:	08/21/2023	
Does the Youth have car insurance?	Yes 	
Name of car insurance provider:	Test Insurance	

5. Enter additional information in the **Additional Comments** field, if applicable. (Optional)
6. Click the **Save** button.

Completing the FT Plan Contact Directory Tab

1. To add contacts for the Final Transition Plan, click the **Contact Directory** tab.

The **Contact Directory** tab appears displaying the **Youth Contacts** section.

Youth Information	Resources	Necessary Documents	Contact Directory	Signatures
-------------------	-----------	---------------------	--------------------------	------------

Contacts	
edit	<input type="checkbox"/> ACTIVE
Test, Adult	
Primary Contact: (740) 123-4567	
Other Contact Info: TEST	
Permanent Adult Connection	
Youth Support Person	

Case Members/Associated Persons/Family & Permanency Team Members:	<input type="text"/>	<input type="button" value="Add"/> -or- <input type="button" value="Create New Contact"/>
---	----------------------	---

2. This tab looks and functions the same as the **Contact Directory** tab for the **Independent Living Plan**. Refer to the **Completing the ILP Contact Directory Tab** section of this Knowledge Base Article for instructions to add or edit contacts.

Creating an Independent Living Plan (ILP)

Completing the FT Plan Signatures Tab

1. To add signatures for the Final Transition Plan, click the **Signatures** tab.

The **Signatures Captured** screen appears. The screen is pre-populated with the Youth, the IL Worker, and the IL Worker's Supervisor (if assigned to the case).

Signatures Captured			
Sacwis, Susie - Youth	Date Signed:	<input type="text"/>	
Worker - Assigned Worker	Date Signed:	<input type="text"/>	
Worker - Supervisor	Date Signed:	<input type="text"/>	

[Add Agency Representative](#)

2. To add an agency representative's signature, click the **Add Agency Representative** button.

The **Available Agency Representatives** screen appears. This screen displays the list of Assigned Workers and Unassigned IL Workers for the associated agency. This list does not include persons who have already been selected.

Creating an Independent Living Plan (ILP)

- Click the checkbox beside each person you wish to select OR click the checkbox in the grid header to select **All** persons in the list.

Youth Information Resources Necessary Documents Contact Directory Signatures

Available Agency Representatives

<input type="checkbox"/>	Test, Caseworker
<input type="checkbox"/>	Test, Caseworker 2
<input type="checkbox"/>	Test, Caseworker 3

- Click the **Save** button.

- The **Signatures Captured** screen appears displaying the selected person(s).

Youth Information Resources Necessary Documents Contact Directory **Signatures**

Signatures Captured

Sacwis, Susie - Youth	Date Signed: 08/24/2023	<input type="button" value="Calendar"/>	
Worker - Supervisor	Date Signed:	<input type="button" value="Calendar"/>	<input type="button" value="Delete"/>
Worker - Assigned Worker	Date Signed:	<input type="button" value="Calendar"/>	<input type="button" value="Delete"/>

- In the **Date Signed** field beside each person, enter the date the signature was recorded.

- If you selected an incorrect person, click the **Delete** icon beside the person to delete the signature entry (shown in blue above).

Note: The Youth's signature cannot be deleted.

- When complete, click the **Save** button.

The **Independent Living Filter Criteria** screen appears displaying the **Independent Living Records** grid.

Creating an Independent Living Plan (ILP)

Creating an Emancipated Youth Plan

Complete the following steps to create an **Emancipated Youth Plan** for a post-emancipation youth who is between their 18th and 22nd birthdays and is no longer in agency custody, but has returned to a public agency to request help with an issue(s)

Navigating to the Emancipated Youth Plan Screen

1. Navigate to the **Independent Living Records** screen as described previously.

In the **Independent Living Records** section:

2. In the **Plan Type** field, select **Emancipated Youth** from the drop-down list.
(Required)
3. In the **Youth Name** field, select the appropriate name from the drop-down list.
(Required)

The screenshot shows the 'Independent Living Records' section. It contains a table with the following data:

	Youth Name	Plan Type	Plan Developed Date	Plan Closed Date	Agency	
edit	Sacwis, Susie	Independent Living Plan Status: Active	08/23/2023		Test County Children Services Board	
edit	Sacwis, Susie	Final Transition Plan	08/24/2023		Test County Children Services Board	

Below the table is a form to add a new plan, highlighted with a red border. The form contains the following fields:

- Plan Type: * (dropdown menu) - Emancipated Youth Plan
- Youth Name: * (dropdown menu) - Sacwis, Susie
- Add Plan button

4. Click the **Add Plan** button.

Creating an Independent Living Plan (ILP)

The **Emancipated Youth Plan** screen appears displaying several tabs. The system defaults to the **Emancipated Youth** tab as shown below.

The screenshot shows the 'Emancipated Youth Plan' screen with the following elements:

- Navigation tabs: Emancipated Youth (selected), Topics, Contact Directory, Signatures.
- Section header: Emancipated Youth Plan.
- Form fields:
 - Plan Developed Date: * (calendar icon)
 - Plan Closed Date: (calendar icon)
 - What service(s) is the Youth requesting to achieve self-sufficiency? * [Expand Full Screen](#)
 - Describe the Youth's strengths and needs: * [Expand Full Screen](#)
- Character counts: Each text input area has a blue button with '✓ABC' and a grey button with '4000'.
- Footer: A dark bar containing 'Apply', 'Save', and 'Cancel' buttons.

Completing the Emancipated Youth Tab

1. Enter the **Plan Developed Date**. (Required)
2. Enter narrative to answer the question: **What service(s) is the Youth requesting to achieve self-sufficiency?** (Required)
3. Enter narrative to **Describe the Youth's strengths and needs**. (Required)
4. Click the **Apply** button.

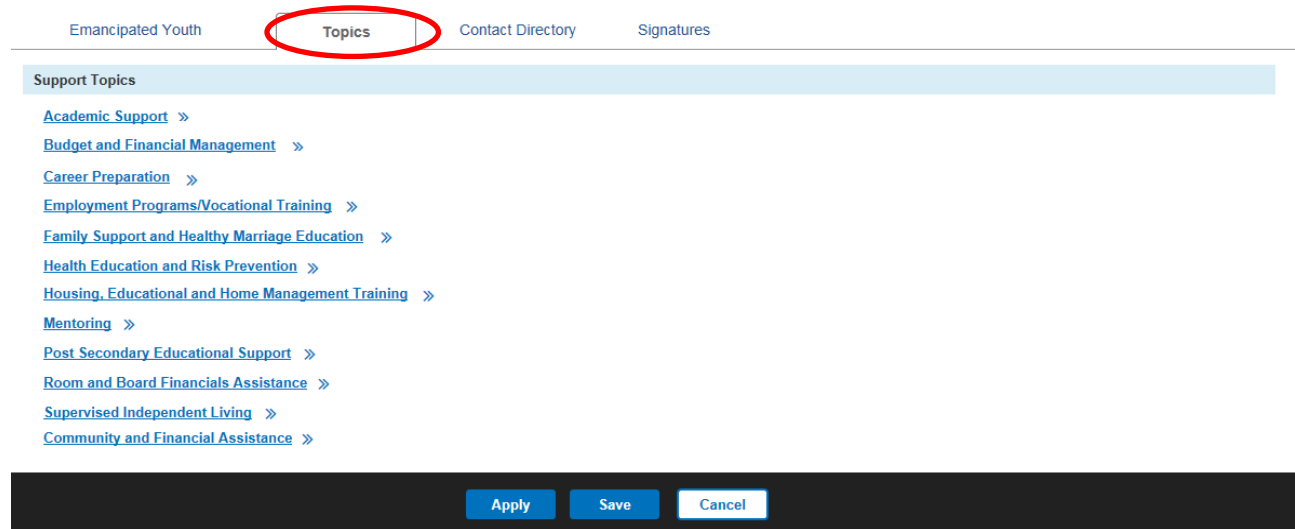
Creating an Independent Living Plan (ILP)

Completing the Topics Tab

To add topics for the youth's emancipation plan, complete the following steps.

1. Click the **Topics** tab.

The **Support Topics** screen appears displaying hyperlinks for various topics of support.



2. Click on a topic hyperlink to expand it:

Note: You can click on the topic again to collapse it.

3. To link a service for that topic, click the **Link Service** button.

The screen displays Case Services information from the Case for the Person ID associated to the Emancipated Youth Plan:

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Emancipated Youth Topics Contact Directory Signatures

Support Topics

Academic Support ▾

Case Member Name(s)	Service category / Type	Service Classification	Effective Dates	
Sacwis, Susie	Independent Living & Transitional Living/ House Education And Home Management Training	Case Member	08/22/2015 - 08/22/2016	unlink

Case Member / Caregiver History

[Link Service](#)

Describe:

[Apply](#) [Save](#) [Cancel](#)

Budget and Financial Management »

4. Click the **Link Service** button to display the **Case Services** page and create/select a case service or select an existing case service.
5. If you do not wish to link a displayed service, click the **Unlink** button at the right of the service row (shown in blue above).
6. In the **Describe** field, enter a description of the service. (Optional)
7. Repeat **Steps 2 through 6** above for each Support Topic that you want to include in this Emancipated Youth Plan.
8. Click the **Apply** button at the bottom on the screen.

[Apply](#) [Save](#) [Cancel](#)

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Completing the Emancipated Youth Plan Contact Directory Tab

1. To add contacts for the Emancipated Youth Plan, click the **Contact Directory** tab.

The **Contact Directory** tab appears displaying the **Youth Contacts** section.

The screenshot shows a 'Contacts' header. Below it, there is a contact entry for 'Test, Adult' with a green 'ACTIVE' status. The contact details include: 'Primary Contact: (740) 123-4567', 'Other Contact Info: TEST', 'Permanent Adult Connection', and 'Youth Support Person'. At the bottom of the contact entry, there is a dropdown menu labeled 'Case Members/Associated Persons/Family & Permanency Team Members:' and two buttons: 'Add' and 'Create New Contact'.

2. This tab looks and functions the same as the **Contact Directory** tab for the **Independent Living Plan**. Refer to the **Completing the ILP Contact Directory Tab** section of this Knowledge Base Article for instructions to add or edit contacts.

Completing the Emancipated Youth Plan Signatures Tab

1. To add signatures for the Emancipated Youth Plan, click the **Signatures** tab.

The **Signatures Captured** screen appears. The screen is pre-populated with the Youth, the IL Worker, and the IL Worker's Supervisor (if assigned to the case).

The screenshot shows a 'Signatures Captured' header. Below it is a table with three rows. The first row is for 'Sacwis, Susie - Youth', the second for 'Worker - Assigned Worker', and the third for 'Worker - Supervisor'. Each row has a 'Date Signed:' field with a calendar icon and a trash icon. At the bottom of the screen, there is a button labeled 'Add Agency Representative' which is highlighted with a red box.

2. To add an agency representative's signature, click the **Add Agency Representative** button.

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The **Available Agency Representatives** screen appears. This screen displays the list of Assigned Workers and Unassigned IL Workers for the associated agency. This list does not include persons who have already been selected.

3. Click the checkbox beside each person you wish to select OR click the checkbox in the grid header to select **All** persons in the list.

Available Agency Representatives

<input type="checkbox"/>	Test, Caseworker
<input type="checkbox"/>	Test, Caseworker 2
<input type="checkbox"/>	Test, Caseworker 3

Save Cancel

4. Click the **Save** button.

5. The **Signatures Captured** screen appears displaying the selected person(s).

Signatures Captured

Sacwis, Susie - Youth	Date Signed: 08/24/2023	
Worker - Supervisor	Date Signed:	
Worker - Assigned Worker	Date Signed:	

Add Agency Representative

Apply Save Cancel

6. In the **Date Signed** field beside each person, enter the date the signature was recorded.

7. If you selected an incorrect person, click the **Delete** icon beside the person to delete the signature entry (shown in blue above).

Note: The Youth's signature cannot be deleted.

8. When complete, click the **Save** button.

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The **Independent Living Filter Criteria** screen appears displaying the **Independent Living Records** grid.

Recording a Credit Report

Complete the following steps to record the **Credit Reports** that are requested by the agency from the three main credit reporting agencies for a child aged 14 or older. The Credit Reports will pull into the child's Independent Living Plan and Final Transition Plan.

Navigating to the Credit Reports Screen

1. Navigate to the **Independent Living Records** screen as described previously.
2. Click the **Credit Reports** tab.

The **Credit Reporting Filter Criteria** screen appears displaying the **Credit Reporting Records** grid.

The screenshot displays the 'Credit Reporting Filter Criteria' screen. On the left is a sidebar with a list of navigation links, including 'Independent Living' which is highlighted. The main content area has a header showing 'CASE NAME / ID: Adoption Sacwis, Susie' and 'Open (11/21/2022)'. Below the header are two tabs: 'Independent Living' and 'Credit Reports', with the latter being active. The 'Credit Reporting Filter Criteria' section includes fields for 'Youth Name', 'Credit Reporting Agency', and 'Requested Date' (with 'From Date' and 'To Date' sub-labels). There is a 'Sort Results By' dropdown set to 'Requested Date (Descending)' and an 'Include Created in Error' checkbox. 'Filter' and 'Clear Form' buttons are present. Below this is the 'Credit Reporting Records' section, which features a table with columns: 'Youth Name', 'Credit Reporting Agency', 'Requested Date', 'Provided Date', and 'Inconsistencies'. An 'Add Credit Report' button is located above the table.

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Note: A **Narrative** (“N”) icon will display if text was entered in the **Comments** field of the credit reporting record. You can hover the mouse pointer over the “N” icon to display the narrative.

Credit Reporting Records						
Youth Name: * <input type="text"/> <input type="button" value="Add Credit Report"/>						
Result(s) 1 to 4 of 4 / Page 1 of 1						
	Youth Name	Credit Reporting Agency	Requested Date	Provided Date	Inconsistencies	
edit	Sacwis, Susie	Equifax	08/24/2023			
edit	Sacwis, Susie	Equifax	07/07/2023	07/19/2023	No	
edit	Sacwis, Susie	Experian	07/07/2023	07/19/2023	No	
edit	Sacwis, Susie	Trans Union	07/07/2023	07/19/2023	No	

- To filter and/or navigate through a long list of **Credit Reporting Records**, you may:
 - Enter **Filter Criteria** (such as the **Youth Name** and/or **Credit Reporting Agency**) and click the **Filter** button to shorten the list of records.

Independent Living | Credit Reports

Credit Reporting Filter Criteria

Youth Name: Credit Reporting Agency:

Requested Date: -

Sort Results By:

Include Created in Error:

- In the **Youth Name** field, select the appropriate name from the drop-down list. (Required)
- Click the **Add Credit Report** button.

Creating an Independent Living Plan (ILP)

Credit Reporting Records

Youth Name: *

Youth Name	Credit Reporting Agency	Requested Date	Provided Date	Inconsistencies
------------	-------------------------	----------------	---------------	-----------------

The **Credit Report Details** screen appears.

Credit Report Details

Credit Reporting Agency: *

Date Credit Report Requested: *

Date Credit Report Provided to the Youth:

Were Inconsistencies Found:

Comments: [\(expand full screen\)](#)

Adding a Credit Reporting Record


On the **Credit Report Details** screen:


1. In the **Credit Reporting Agency** field, select the name of the appropriate credit reporting agency. (Required)
2. Enter the **Date Credit Report Requested**. (Required)
3. Enter additional information in the **Comments** field, if desired.

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Credit Report Details

Credit Reporting Agency: *

Date Credit Report Requested: * 

Date Credit Report Provided to the Youth: 

Were Inconsistencies Found:

Comments: [\(expand full screen\)](#)

4. Click the **Save** button.

The **Credit Reporting Filter Criteria** screen appears.

Credit Reporting Records

Youth Name: *

Result(s) 1 to 4 of 4 / Page 1 of 1

	Youth Name	Credit Reporting Agency	Requested Date	Provided Date	Inconsistencies	
edit	Sacwis, Susie	Equifax	08/24/2023			
edit	Sacwis, Susie	Equifax	07/07/2023	07/19/2023	No	
edit	Sacwis, Susie	Experian	07/07/2023	07/19/2023	No	
edit	Sacwis, Susie	Trans Union	07/07/2023	07/19/2023	No	

Editing a Credit Reporting Record

1. Navigate to the **Credit Reporting Filter Criteria** screen displaying the **Credit Reporting Records** grid using the steps previously discussed.

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Credit Reporting Records

Youth Name: * Add Credit Report

Result(s) 1 to 4 of 4 / Page 1 of 1

	Youth Name	Credit Reporting Agency	Requested Date	Provided Date	Inconsistencies
edit	Sacwis, Susie	Equifax	08/24/2023		
edit	Sacwis, Susie	Equifax	07/07/2023	07/19/2023	No
edit	Sacwis, Susie	Experian	07/07/2023	07/19/2023	No
edit	Sacwis, Susie	Trans Union	07/07/2023	07/19/2023	No

2. Click the **Edit** link beside the appropriate credit reporting record.

The **Credit Report Details** screen appears.

Credit Report Details

Credit Reporting Agency: *

Date Credit Report Requested: *

Date Credit Report Provided to the Youth:

Were Inconsistencies Found:

Historical Comments: [\(expand full screen\)](#)

Updated Comments: [\(expand full screen\)](#)

✓ ABC
300

3. Enter or modify information as appropriate.
4. If you selected **Yes** in the **Were Inconsistencies Found** field, you must enter the **Date Inconsistencies Reported to the Ohio Attorney General**.

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Credit Report Details

Credit Reporting Agency: *

Date Credit Report Requested: *

Date Credit Report Provided to the Youth:

Were Inconsistencies Found:

Date Inconsistencies reported to the Ohio Attorney General:

Historical Comments: [\(expand full screen\)](#)

Updated Comments: [\(expand full screen\)](#)

Created in Error

Created By: Verity, Angela Date: 08/24/2023

5. The **Historical Comments** field displays any comments that were entered previously and is not editable. Enter any additional or updated information in the **Updated Comments** text field. (Optional)

Note: After saving this record, any comments entered in the **Updated Comments** field will be added to the previous Comments and will display in the **Historical Comments** field (as shown by the “second comment” in the example above).

6. If this record was created in error, click the **Created in Error** checkbox (shown in blue above).
7. Click the **Save** button.

The **Credit Reporting Filter Criteria** screen appears displaying the **Credit Reporting Records** section.

Note: If you marked the record as **Created in Error**, it will no longer display in the grid by default. To display these records, click the **Include Created in Error** checkbox in the Filter

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Criteria section of the screen and click the **Filter** button. The grid will display a **Created in Error** indicator beside the relevant records as shown below.

Independent Living
Credit Reports

Credit Reporting Filter Criteria

Youth Name:
Sacwis, Susie 07/03/2009
▼

Requested Date: From Date - To Date

Sort Results By: Requested Date (Descending) ▼

Include Created in Error:

Filter
Clear Form

Credit Reporting Agency: ▼

Credit Reporting Records

Youth Name: * Sacwis, Susie 07/03/2009 ▼ Add Credit Report

Result(s) 1 to 4 of 4 / Page 1 of 1

	Youth Name	Credit Reporting Agency	Requested Date	Provided Date	Inconsistencies	
view	Sacwis, Susie	Equifax	08/24/2023	08/24/2023	Yes	Created in Error
edit	Sacwis, Susie	Equifax	07/07/2023	07/19/2023	No	

If you need additional information or assistance, please contact the OFC Automated Systems Help Desk at SACWIS_HELP_DESK@jfs.ohio.gov .