

# Creating a Final Transition Plan (FT Plan)



**Knowledge Base Article**

# Creating a Final Transition Plan (FT Plan)

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## Creating a Final Transition Plan (FT Plan)

### Overview

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

- Create a Final Transition Plan (FT Plan) for a youth who is within 90 days of Emancipating from agency custody.

Please see **Creating an Independent Living Plan (IL Plan)** Knowledgebase Article for details on how to enter this type of plan for youth 14 years old or older who are in agency custody.

Please see **Creating an Emancipated Youth Plan (EY Plan)** Knowledgebase Article for details on how to enter this type of plan for post-emancipated youth who are between their 18<sup>th</sup> and 21<sup>st</sup> birthdays and are no longer in agency custody but have requested services and/or supports from the agency.

Please see **Recording Credit Reports** Knowledgebase Article for details on how to enter **Credit Reports** requested by the agency from the three main credit reporting agencies for youth aged 14 or older and in agency custody.

# Creating a Final Transition Plan (FT Plan)

## Creating a Final Transition Plan

### Navigating to the Final Transition Plan Screen

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

Case Workload

Caseworker:  Sort By: Case Name Ascending

Test Worker (23 cases)

- Sacwis, Susie **123456** - Open 11/21/2022 - Adoption

The **Case Overview** screen appears.

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

Case Overview

- Activity Log
- Attorney Communication
- Intake List
- Forms/Notices
- Substance Abuse Screening
- Ongoing Case All
- Specialized All 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/CCA
- 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	<b>!</b> Child Recruitment Plan is required for for Person Name / ID:		<input type="button" value="Actions..."/>
06/09/2022	<b>!</b> 7 day face-to-face must be made with child in placement Person Name / ID: Location / Contact		<input type="button" value="Actions..."/>

## Creating a Final Transition Plan (FT Plan)

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' section of a web application. On the left is a navigation menu with 'Independent Living' highlighted. The main area has a header 'Independent Living Records' and a table with columns: Youth Name, Plan Type, Plan Developed Date, Plan Closed Date, and Agency. Below the table is a form with two dropdown menus: 'Plan Type: \*' set to 'Final Transition Plan' and 'Youth Name: \*' set to 'Sacwis, Susie'. An 'Add Plan' button is to the right of the second dropdown. A red box highlights the entire form area.

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.

The screenshot shows the 'Youth Information' tab of the 'Final Transition Plan' screen. The 'Youth Information' tab is highlighted with a red box. Other tabs include 'Resources', 'Necessary Documents', 'Contact Directory', and 'Signatures'. The form contains the following fields:

- Address:
- Contact:
- The Youth would like to receive post emancipation services provided or arranged by the PCSA or PCPA from which the youth emancipated: \* (dropdown menu)
- Plan Developed Date: \* (calendar icon)
- Plan Closed Date: (calendar icon)

A warning message is displayed: Please update Youth's address at time of emancipation.

## Creating a Final Transition Plan (FT Plan)

### 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)

Youth Information Resources Necessary Documents Contact Directory Signatures

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 a Final Transition Plan (FT Plan)

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)
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.

**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) [Department of Higher Education](https://ohiohighered.org) [Education Training Voucher \(ETV\) Program](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

7. Click the **Apply** button.

## Creating a Final Transition Plan (FT Plan)

### 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).

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

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)



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Does the youth have a checking account? Yes

Bank Name and Information:

✓ ABC  
250

Does the youth have a savings account? Yes

Bank Name and Information:

✓ ABC  
250

Does the youth have any outstanding court fees? Yes

Describe:

✓ ABC  
250

Resources available to youth:

[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:

[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

6. 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.

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

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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 Date Provided to Youth associated to the youth's Credit Report for each credit reporting agency (if applicable).

8. 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)
9. 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**.

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

**Note:** **Type of housing upon emancipation** is required when ending a FT Plan.

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**Housing Information**

Type of housing upon emancipation:

- House
- Apartment
- Boarding House
- Shelter
- Other (please specify)

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.)*

11. Click the **Save** button.

# Creating a Final Transition Plan (FT Plan)

## Completing the Necessary Documents Tab

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

The **Record Information** screen appears.

The screenshot shows a web interface with a navigation bar at the top containing 'Youth Information', 'Resources', 'Necessary Documents' (highlighted with a green box), 'Contact Directory', and 'Signatures'. Below the navigation bar is a blue header for 'Record Information'. The main content area lists eight date-related fields, each with a text label and 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:', and 'Date Youth received letter verifying Emancipation from Agency Custody:'. Below these fields is a link: 'Go to Forms/Notices to generate the **Wardship Letter** (Verification of County Wardship)'. At the bottom of the form is an 'Additional Comments:' field with a '(expand full screen)' link and a '✓ ABC' button. The footer contains 'Apply', 'Save', and 'Cancel' buttons, and a character count of '500'.

2. 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)
3. If you selected **Yes**, you may enter the **Name of car insurance provider**. (Optional)

## Creating a Final Transition Plan (FT Plan)

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

4. Enter additional information in the **Additional Comments** field, if applicable.  
(Optional)

**Note:** All date fields on **Necessary Documents** are required when end dating the FT Plan except for **Date Youth received State Identification Card** and **Date Youth received Driver's License**. Only one of these 2 fields needs to be entered prior to end dating the FT Plan.

**Note:** If a youth is AWOL (has an AWOL alert on their Person record), these date fields will not be required.

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

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### Completing the Contact Directory Tab

To add **Youth Contacts** to an IL Plan, Final Transition Plan (FT Plan), Emancipated Youth Plan (EY Plan), or National Youth in Transition Database (NYTD), complete the following steps. When this information is added or changed from any of these areas, the change will be reflected in any of the other areas that are created. For example, if a youth has an IL Plan, FT Plan, and NYTD, if a Youth Contact is added on the IL Plan, the new contact will display on the FT Plan and NYTD. This information can be edited on any Active or Pending IL Plan, non-end-dated FT, or EY Plan, or at any time through NYTD (even when the case is closed) as long as an account had been generated for the youth.

1. Click the **Contact Directory** tab from any of the above mentioned work items.

The **Youth Contacts** screen appears.

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

Contacts

*This youth has no Permanent Adult Connection*

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

If a youth does not have a Permanent Adult Connection identified, this warning will display.

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

Contacts

*This youth has no Permanent Adult Connection*

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

## Creating a Final Transition Plan (FT Plan)

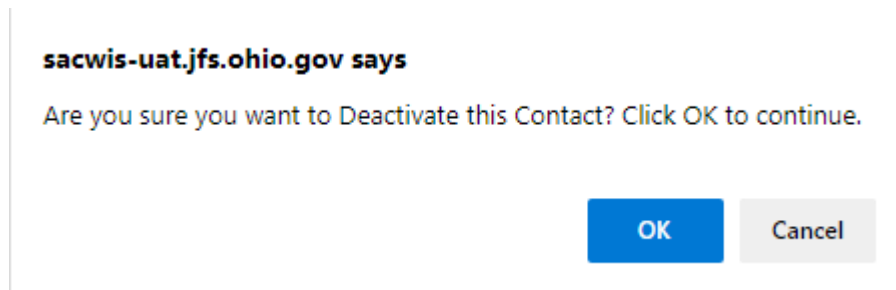
2. If the contact is a Case Member or Associated Person on the case, select the name of the contact from the **Case Members/Associated Persons** drop-down list.
  - OR if the contact person you wish to add is not listed in the drop-down, skip to **Step 9** below.
3. Click the **Add** button.

The person is added to the **Youth Contacts** grid in **Active** status:



The screenshot shows a table header 'Youth Contacts'. Below it, there is a row for a contact named 'Test - Sister'. To the right of the name is a green toggle switch labeled 'ACTIVE', which is highlighted with a red rectangular box. Below the name, there are three lines of text: 'Primary Contact: Test Contact', 'Other Contact Info: Business hours only', and 'Permanent Adult Connection: No'. There is also a small blue 'edit' link to the left of the name.

**Note:** Youth Contacts will now have an Active or Inactive status. This is to assist in maintaining a history of a youth's contacts while still reflecting which contacts are current. This will also update in all the existing work items mentioned above. By clicking on the **Active** toggle, that Youth Contact will become **Inactive**. When inactivating a Youth Contact, a message will pop up to verify that you want to deactivate the contact.



The screenshot shows a modal dialog box with a title bar that says 'sacwis-uat.jfs.ohio.gov says'. The main text inside the dialog asks, 'Are you sure you want to Deactivate this Contact? Click OK to continue.' At the bottom right of the dialog, there are two buttons: a blue 'OK' button and a grey 'Cancel' button.

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




This screenshot is similar to the one above, showing the 'Youth Contacts' grid with the 'Test - Sister' contact. However, in this view, the small blue 'edit' link to the left of the contact name is highlighted with a red rectangular box. The 'ACTIVE' toggle is still present and highlighted in green.

The **Contact Details** screen appears displaying details for that contact from their Person record.

## Creating a Final Transition Plan (FT Plan)


5. If this adult has a permanent connection to the youth, click the checkbox beside **This contact is a permanent adult connection**. (Optional)


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

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

6. Enter narrative in the **Other Contact Information** text box, if applicable. (Optional)
7. When complete, click the **Save** button to return to the **Youth Contacts** screen.
8. 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.



## Creating a Final Transition Plan (FT Plan)

9. 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.

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

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**Contacts**

 *This youth has no Permanent Adult Connection*

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

The **Contact Details** screen appears.

10. 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 if there is not enough information to enter a new Person record. (Required)

**Note:** Through the Search Person, a contact can be selected that is known to Ohio SACWIS or a new person can be created.

**Contact Details**

Contact Name: \*  -or-

Relationship to Youth: \*

This contact is a Permanent Adult Connection ⓘ

Youth Support Person ⓘ

Contact Address:

Contact Type:  Contact:

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

## Creating a Final Transition Plan (FT Plan)

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: \* 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

**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.

11. Select this person's relationship to the youth from the **Relationship to Youth** drop-down list. (Required)
12. If this adult has a permanent connection to the youth, click the checkbox beside **This contact is a Permanent Adult Connection**. (Optional)
13. Select from the drop-down menu **If you want to make this person an active Family & Permanency Team Member**. (Required)

## Creating a Final Transition Plan (FT Plan)

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

**Note:** When a Person is selected, their contact information (address and phone number) will not be editable through the **Contact Directory**. Click on the **Person Name/ ID** hyperlink to edit their information.

**Important:** At least **one** of the following is **Required** in order to save this Contact record. These fields are described in the Steps 14-16 below.

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

14. 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, labeled 'Contact Address:', contains the text '123 Test Rd' and 'Test, Oh 12345' stacked vertically. Below this text is a blue button labeled 'Remove Address'. The bottom section, labeled 'Contact Type:', features a dropdown menu with a downward arrow and a 'Contact:' label followed by 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.

15. Enter fields for **Contact Type**, **Contact**, and **Ext** display if you did not Search/select a person in Step 10 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.
  - c. If you selected Phone Number as the Contact Type, enter the phone extension in the **Ext** field, if applicable.

## Creating a Final Transition Plan (FT Plan)

Contact Address: 123 Test Rd  
Test, Oh 12345  
Remove Address

Contact Type: [dropdown] Contact: [text box]

Other Contact Information: (expand full screen)

ABC  
2000

Save Cancel

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

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

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

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

Contacts

<a href="#">edit</a>	Test, Adult	- Grandfather	ACTIVE
----------------------	-------------	---------------	--------

Primary Contact: (123) 456-7890  
Other Contact Info: TEST  
Permanent Adult Connection  
Youth Support Person

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

19. 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 IL Plan 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 a Final Transition Plan (FT Plan)

### 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 assigned to the case, and the IL Worker's Supervisor.

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"/>	

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.

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.

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

4. Click the **Save** button.

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

## Creating a Final Transition Plan (FT Plan)

**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

1. In the **Date Signed** field beside each person, enter the date the signature was recorded. (Optional)
2. 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.

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

**Independent Living Records**

	Youth Name	Plan Type	Plan Developed Date	Plan Closed Date	Agency	
<a href="#">edit</a>	Sacwis, Susie	Final Transition Plan	08/29/2023		Test County Children Services Board	

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

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

If you have additional questions pertaining to this Deployment Communication, please contact the [Customer Care Center](#).