Creating a Final Transition Plan (FT Plan)

Knowledge Base Article

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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^{th} and 21^{st} 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.

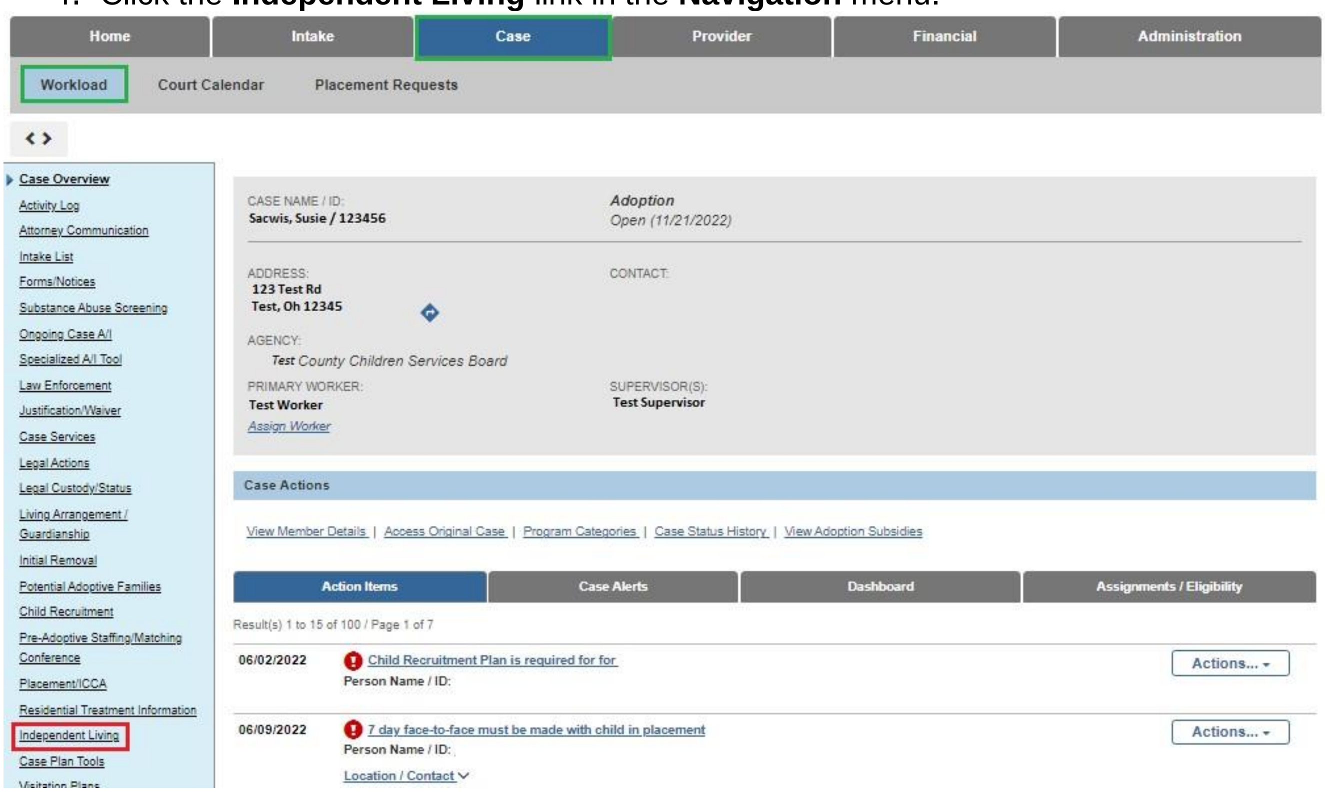
Creating a Final Transition Plan

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.

The **Case Overview** screen appears.

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

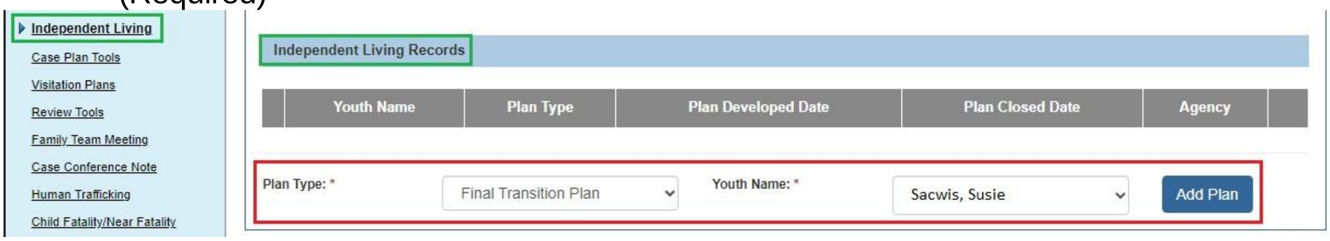


Creating a Final Transition Plan (FT Plan)

In the **Independent Living Records** section:

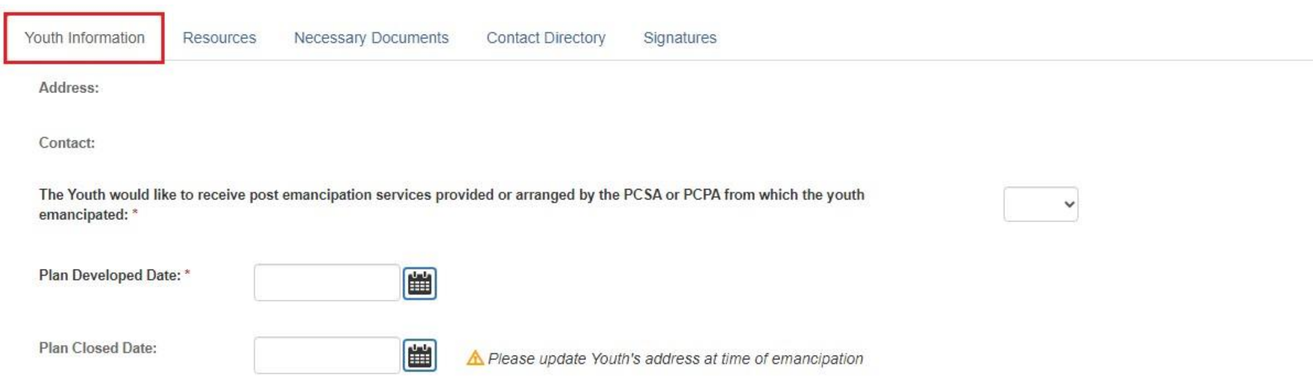
1. In the **Plan Type** field, select **Final Transition Plan** from the drop-down list. (Required)

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



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

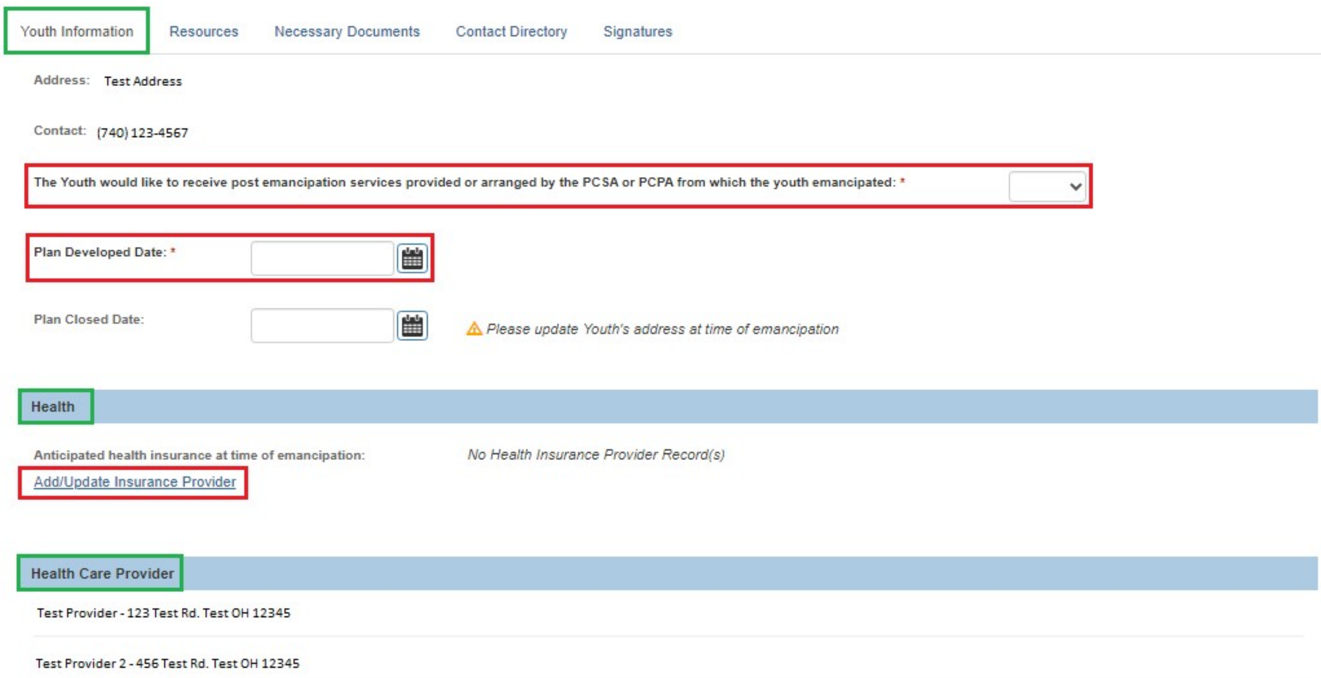
The **Final Transition Plan** screen appears displaying several tabs. The system defaults to the **Youth Information** tab as shown below.



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)



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.

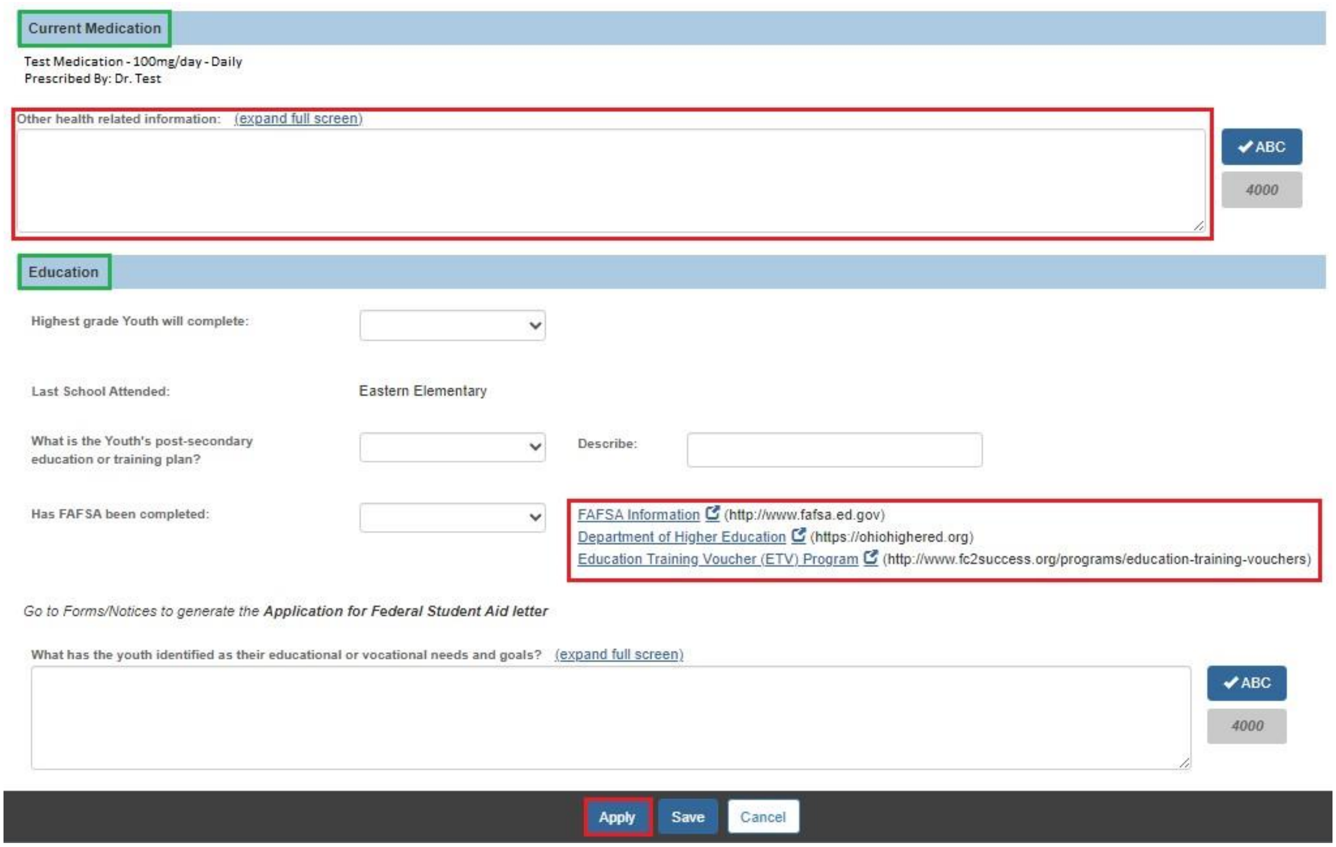
The **Current Medication** section lists information about current medications for the youth.

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.



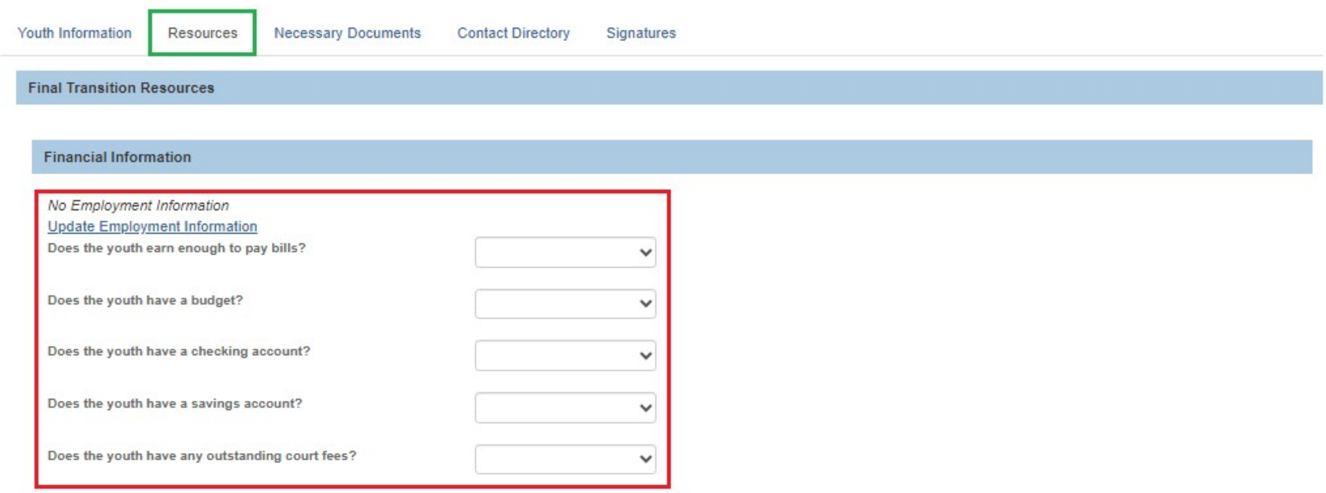
7. Click the **Apply** button.

Completing the Resources Tab

1. Click the **Resources** tab.

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

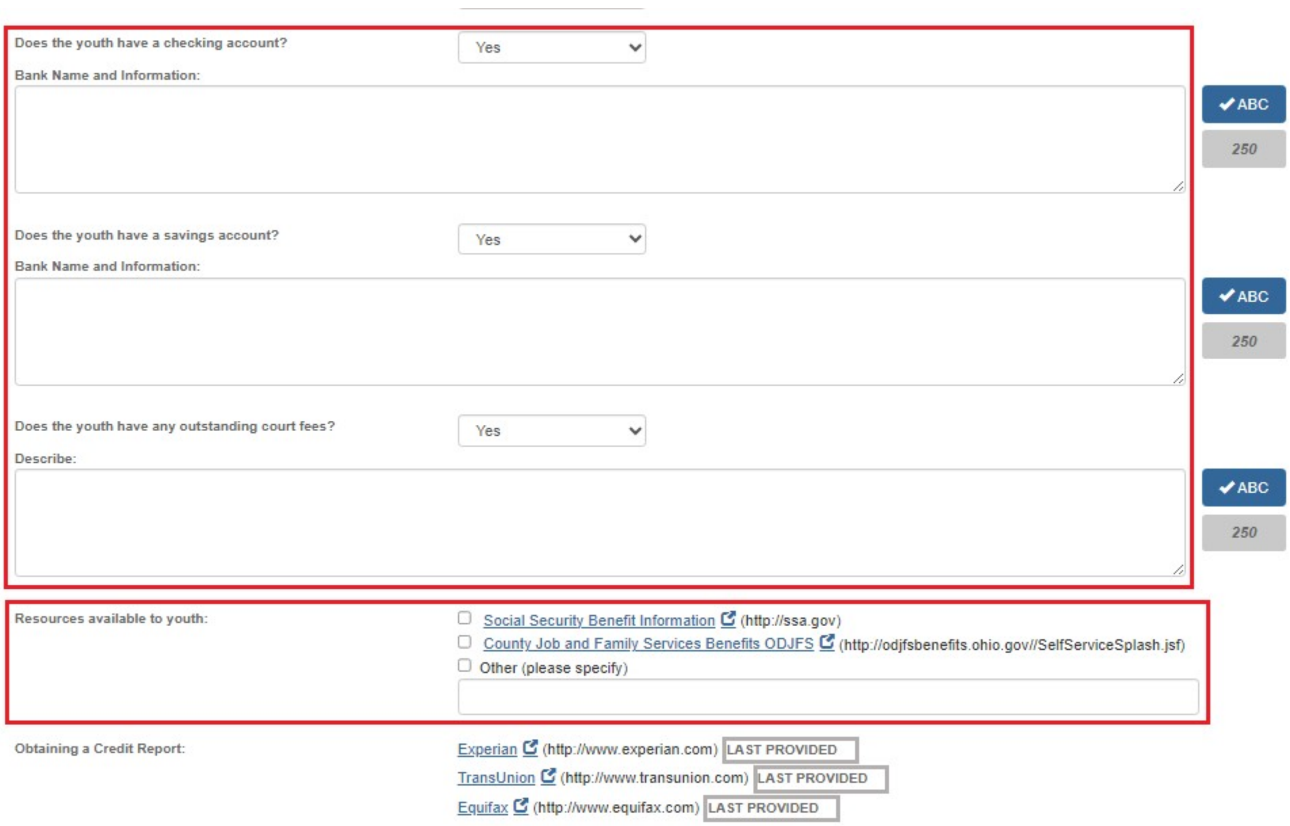
2. The top portion of the **Financial Information** section displays the current employer(s) from the youth's Person record. If needed, click the **Update Employment Information** link to update the youth's employer(s).



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. 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.

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).

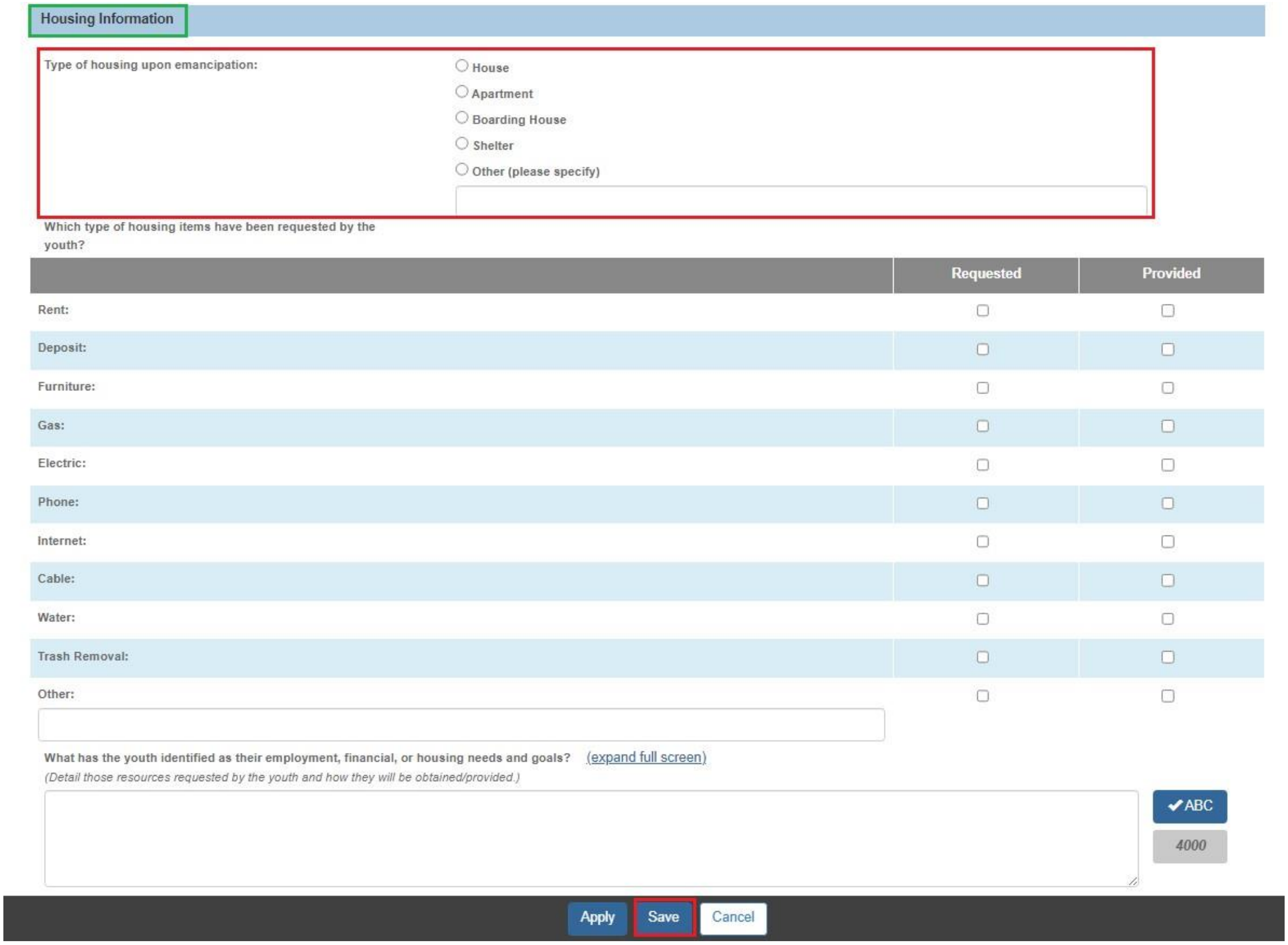
8. To obtain a credit report(s) for the youth, click the appropriate credit reporting agency link(s) in the **Obtaining a Credit Report** field. (Optional)

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.

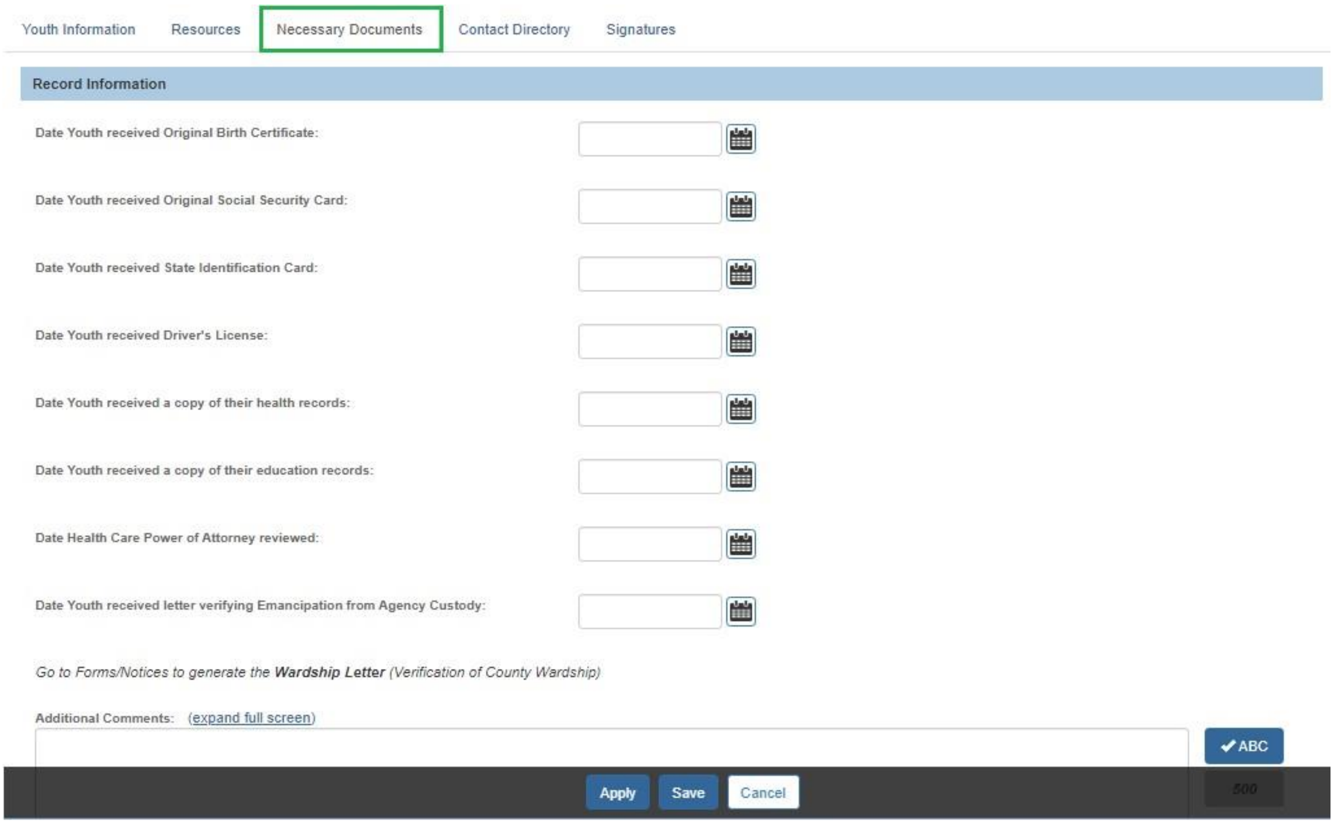


11. Click the **Save** button.

Completing the Necessary Documents Tab

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

The **Record Information** screen appears.



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)

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.

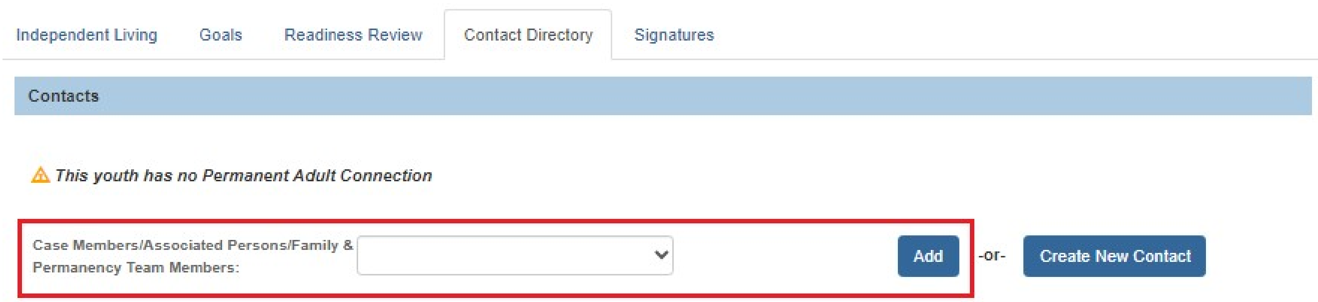
5. Click the **Save** button at the bottom on the screen.

Completing the Contact Directory Tab

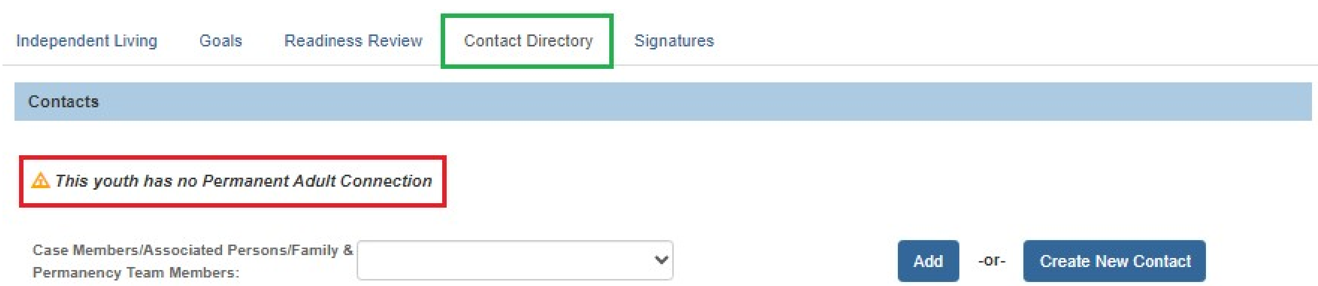
To add **Youth Contacts** to an IL Plan, Final Transition Plan (FT Plan), Emancipated Youth Plan (EY Plan), or National Youth in Transition Database (NYTD), complete the following steps. When this information is added or changed from any of these areas, the change will be reflected in any of the other 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.



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

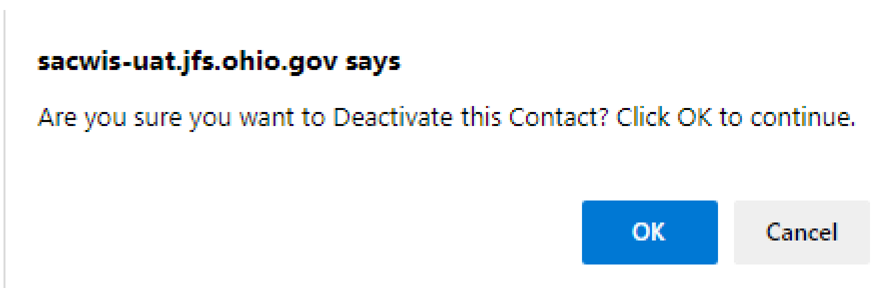


2. If the contact is a Case Member or Associated Person on the case, select the name of the contact from the **Case Members/Associated Persons** drop-down list.
    - OR if the contact person you wish to add is not listed in the drop-down, skip to **Step 9** below.

3. Click the **Add** button.

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

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.

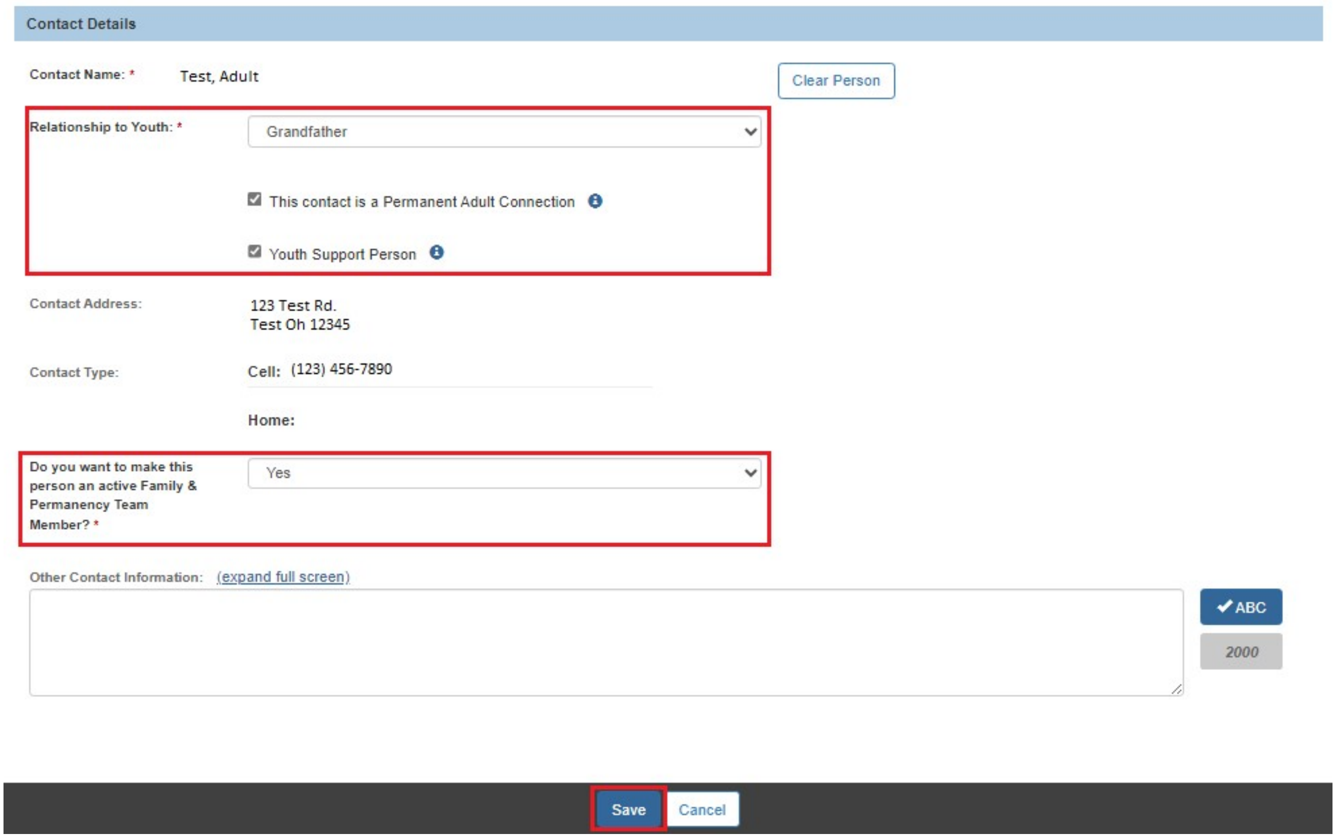


4. Click the **Edit** link beside the newly added contact.

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

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.



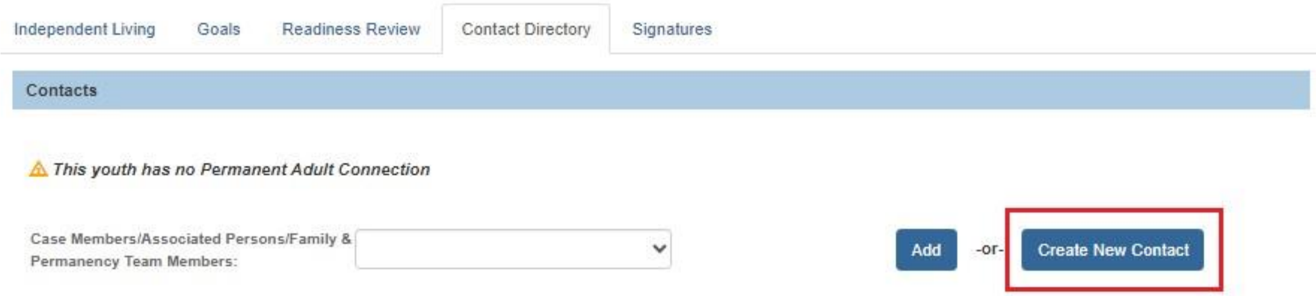
6. Enter narrative in the **Other Contact Information** text box, if applicable. (Optional)

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.

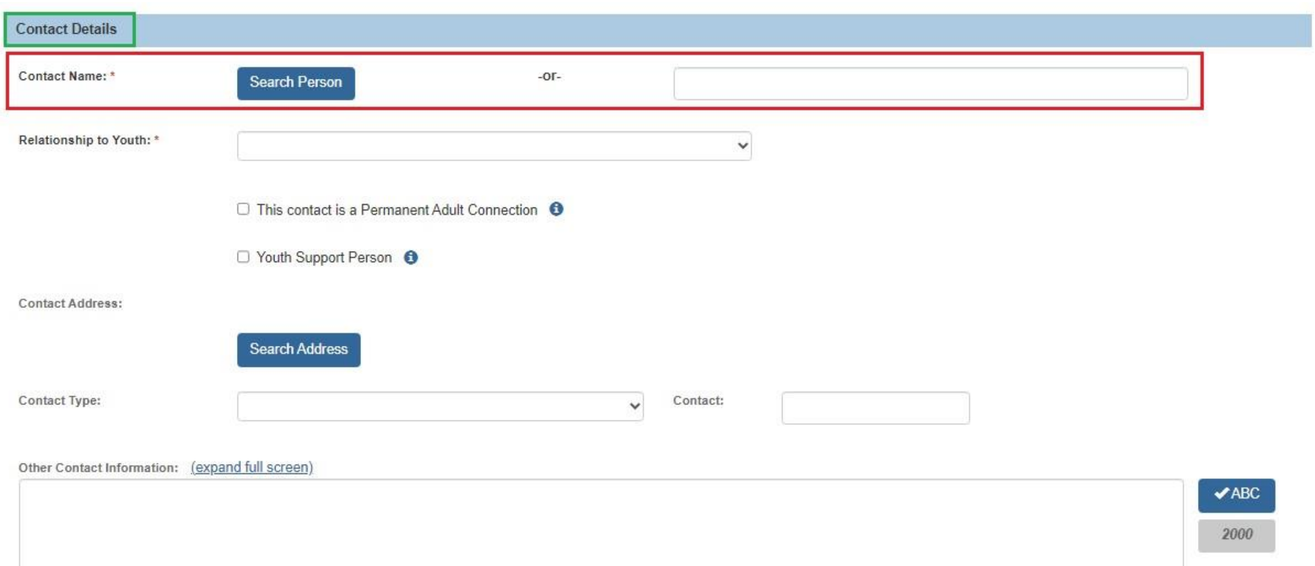
9. If the contact you wish to add is <u>not</u> listed in the **Case Members/Associated Persons** drop-down list, click the **Create New Contact** button.



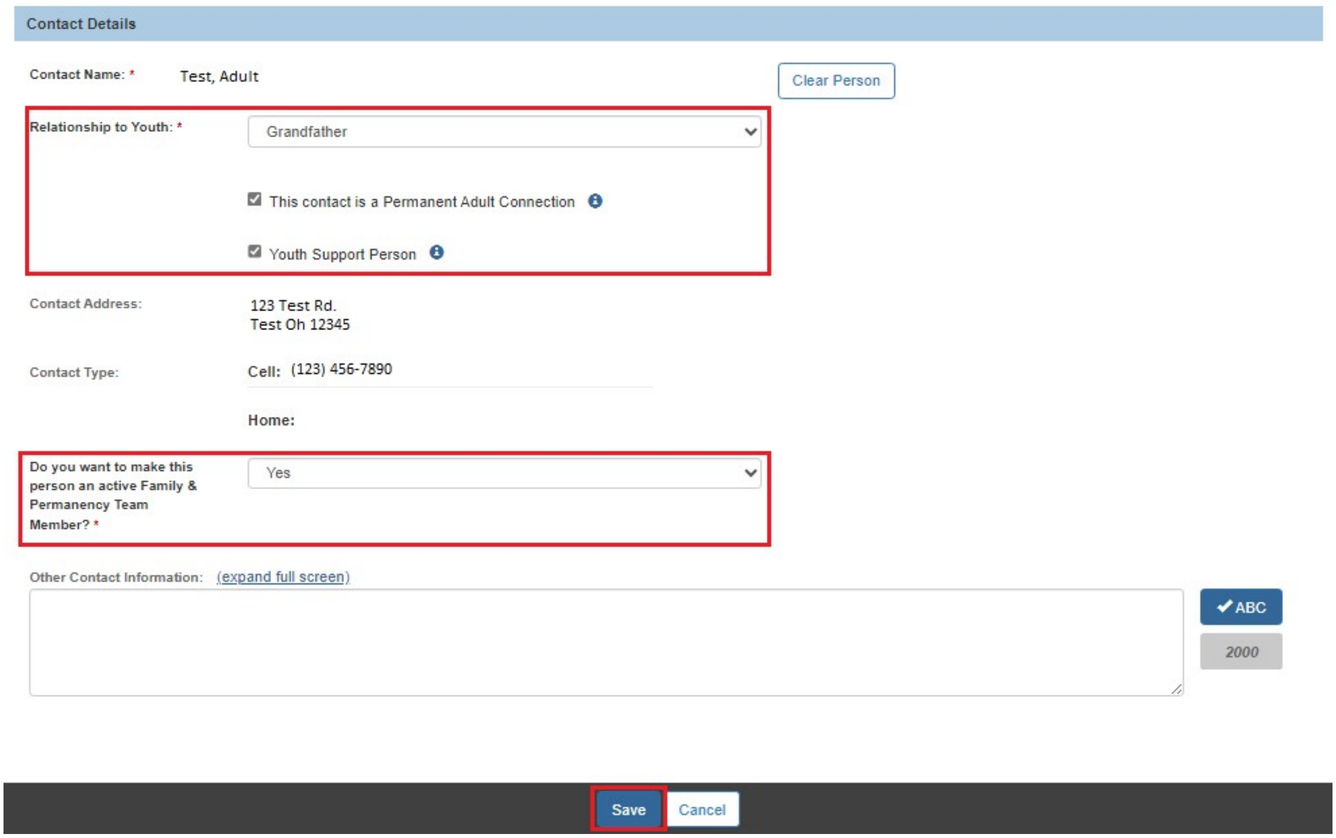
The **Contact Details** screen appears.

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.



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



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)

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.

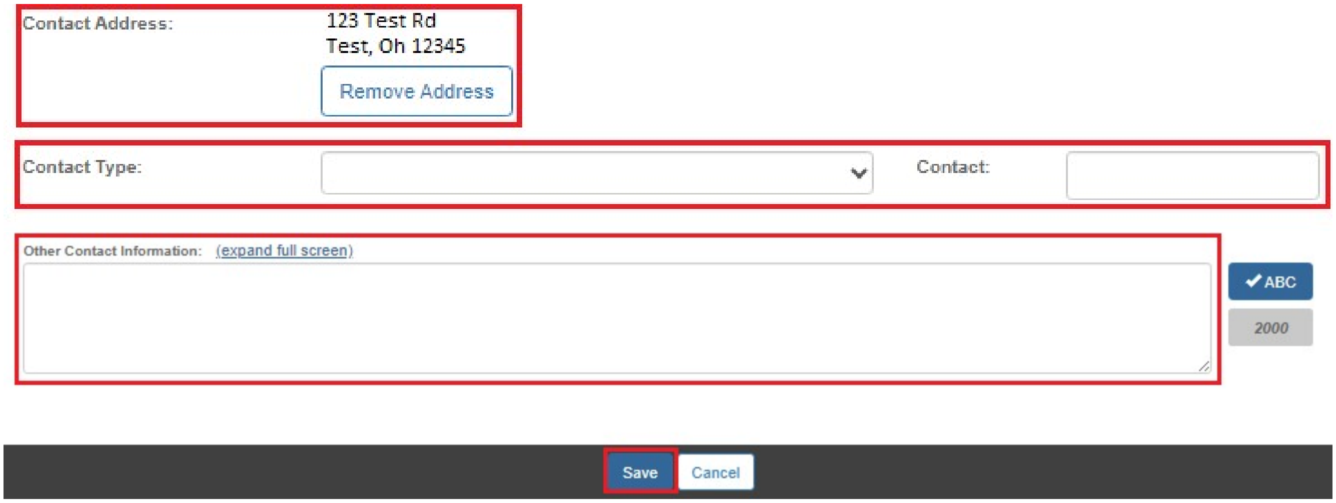
- **Contact Address** field, and/or
- **Contact Type** / **Contact** fields, and/or
- **Other Contact Information** field.

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:

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.



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.

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.

Completing the FT Plan Signatures Tab

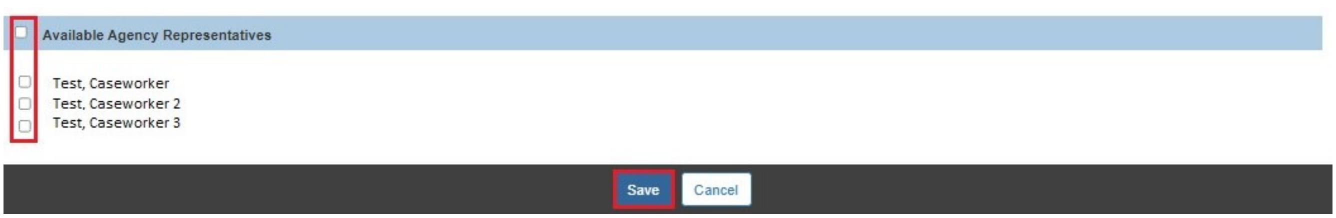
1. To add signatures for the Final Transition Plan, click the **Signatures** tab.

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.

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.

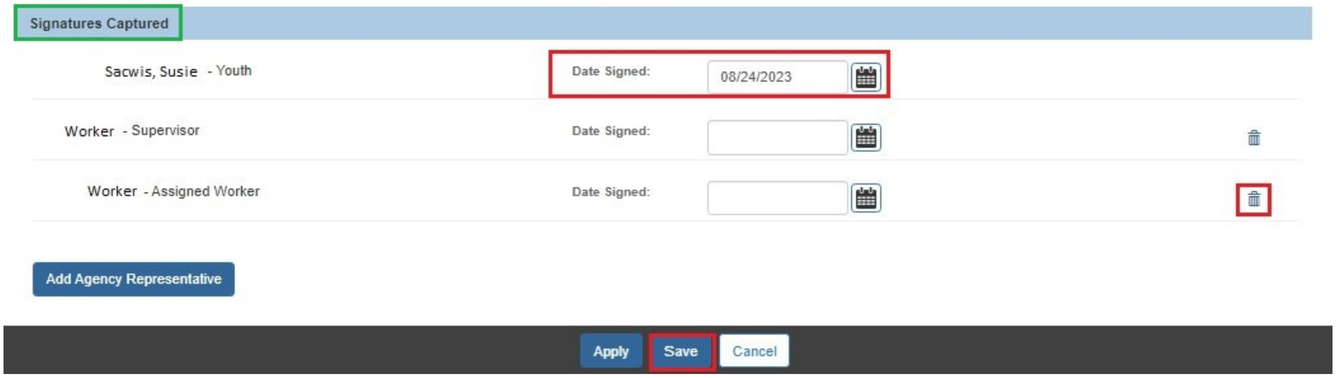
3. Click the checkbox beside each person you wish to select OR click the checkbox in the grid header to select **All** persons in the list.



4. Click the **Save** button.

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

Creating a Final Transition Plan (FT Plan)

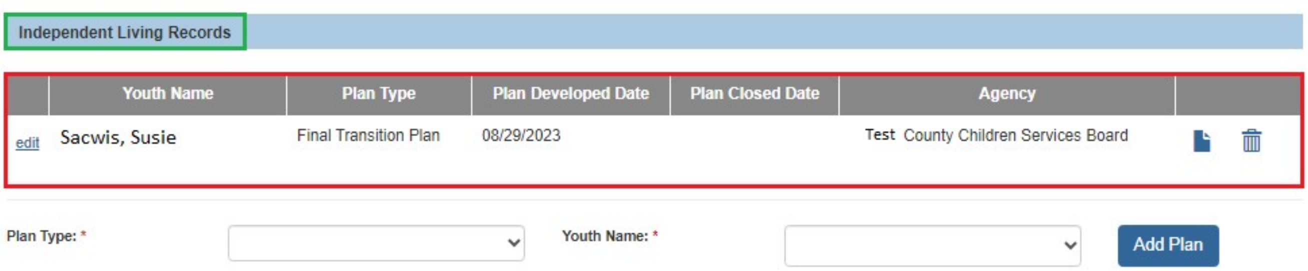


1. In the **Date Signed** field beside each person, enter the date the signature was recorded. (Optional)

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.



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.