



Independent Living Assessment and Plan Quick Reference Desk Guide for Child Welfare Agencies (CWAs)

This resource includes guidance about the Independent Living (IL) Assessment and Plan requirements for county Child Welfare Agency (CWA) partners. If you are not a county CWA partner but find all or part of this resource useful to inform your own transition and discharge procedures, feel free to also use it!

“What IL documents need to be completed when a young person becomes IL-eligible?”

Child welfare professionals (CWPs) are required to complete an IL assessment and IL plan with a young person when the youth becomes [IL-eligible](#). Completion of both shall be youth-driven. As needed, the CWP shall assist the youth with the assessment and use that as the starting point to develop an IL plan alongside the young person. The IL plan shall be youth-driven and equally informed by the results of the youth’s IL assessment and the youth’s input about their goals, interests, needs, and challenges. The plan shall then inform which services and supports are provided to the youth.

Best practice is for the CWP and young person to revisit both the assessment and plan every six months, based on when the last plan was completed. This likely will not require a full re-assessment or wholly new plan each time; rather, it’s an opportunity to review what was previously discussed and developed, and update either or both documents as relevant to reflect the youth’s progress towards IL wants, needs, and goals.

“How will I know when an IL assessment or IL plan is due?”

For CWPs utilizing eWiSACWIS, tasks serve as a reminder about IL requirements and due dates. See the schedule below.

Task	Task release date	Due date	Removal
IL Assessment/Plan Due (<i>initial</i>)	Age 14 and 6 months	Age 14 and 9 months	When dates are entered in both the IL Assessment Completed/Revised and IL Plan Completed/Updated date fields
IL Assessment/Plan Due (<i>ongoing</i>)	6 months following date entered in IL Plan Completed/Updated field	90 days after task date	When dates are entered in both the IL Assessment Completed/Revised and IL Plan Completed/Updated date fields



“How do the IL assessment and IL plan relate to the ILTD?”

The IL assessment and IL plan are required for all IL-eligible young people, regardless of whether they will eventually also need an Independent Living Transition to Discharge (ILTD) Plan. The ILTD is only relevant for youth who are projected to discharge from care age at 18 or older, meaning that the IL plan and IL assessment are more broadly relevant to the IL-eligible population.

Work done with and because of the IL assessment and plan can and should serve as the basis for contents of the ILTD. For example, a youth has an education goal in their original IL plan, which evolves as they get older, move through school, and near discharge from care. Progress on and evolution of that goal would be reflected in the youth’s IL assessments and plans throughout their IL eligibility and could serve as the basis for an education goal and its associated steps within their ILTD.

See the [ILTD Writing Guide](#) and [ILTD Desk Guide](#) for more information about the ILTD.

“Which IL assessment do we use?”

Because every agency, professional, and client is different, DCF does not require CWAs to use a specific IL assessment tool. Below are some assessment options. DCF does not endorse any or all of these; rather, knows that these are prolific, accessible, and reflect IL wants, needs, and goals. A CWA may decide to exclusively use one tool or a combination of tools, if they find that one best serves some of their clientele while an alternate tool best serves other clients.

Casey Life Skills

The Casey Life Skills Toolkit is a free resource to assess youth’s independent living wants, needs, and goals. It is [available online](#) and includes an assessment form, practitioner’s guide, and “Resources to Inspire” guide.

Daniel Memorial Institute

The Daniel Memorial Institute offers a variety of Independent Living Assessment options. They are available via [software](#) or [hard copy](#), in long or short forms, and as an interview of objective form. There is a cost for each Daniel Memorial Assessment tool.

	Number Correct	Number Possible	Percentage Correct
1. MONEY MANAGEMENT / BUDGET MANAGEMENT		16	
2. FOOD MANAGEMENT		12	
3. PERSONAL APPEARANCE		12	
4. HEALTH		12	
5. HOUSEKEEPING		16	
6. TRANSPORTATION		12	
7. EDUCATIONAL PLANNING		12	
8. JOB SEEKING SKILLS		12	
9. JOB MAINTENANCE SKILLS		16	
10. EMERGENCY AND SAFETY SKILLS		12	
11. KNOWLEDGE OF COMMUNITY RESOURCES		12	
12. INTERPERSONAL SKILLS		17	
13. LEGAL SKILLS		12	
14. RECREATION/LEISURE		12	
15. LEISURE ACTIVITIES		12	
16. HOUSING		12	
TOTAL CORRECT		+ 231	%

One Daniel Memorial assessment form option. Accessible via <https://www.danielkids.org/product-category/assessments/>

“Which IL assessment do we use?” (cont’d)

Youth Thrive Survey

The Youth Thrive Survey is a self-assessment of youth’s strengths and needs. It is available for free online, but users must first register either as an individual or as part of an organization; see the [user manual](#).

CWA-developed Assessment

CWAs also have the option to develop and administer their own IL assessment tool. Ideally this is done by both incorporating elements from existing IL assessment tools and customizing elements according to the CWA’s geographic area, local resource availability, youth population needs, and more specific considerations. The beauty of a custom-built assessment tool is that it can be made by professionals who best know the clients they serve.

“Which IL plan document do we use?”

Like the IL assessment, DCF does not require CWAs to use a specific IL plan document. As applicable, agencies may use any corresponding plan document(s) that is part of the assessment tools listed in the prior section, may develop and use their own plan document, or may use DCF-CFS2256, which is an optional template. DCF-CFS2256 is accessible by searching [DCF Forms and Publications](#) or directly via <https://dcf.wisconsin.gov/files/forms/doc/2256.docx>.

Today's Date (mm/dd/yyyy)	
Youth's Full Name	Youth's Chosen Name
Youth's Pronouns	Youth's Birthdate (mm/dd/yyyy)
GOAL AREAS AND OUTCOMES	
1. Housing/Safe and Stable Living Arrangements Includes, but is not limited to, plan for placement, where they are living now and where they are going to live post-discharge. Define and describe Goal 1: Define and describe Goal 2: Define and describe Goal 3:	
2. Career Planning and Employment Includes, but is not limited to, career planning, volunteerism, community service, and work-related experience. Define and describe Goal 1: Define and describe Goal 2: Define and describe Goal 3:	

Portion of DCF IL Plan template, form DCF-CF2256 available via <https://dcf.wisconsin.gov/files/forms/doc/2256.docx>

Remember!

Regardless of what IL plan document you use, the process should be youth-driven. To prevent overwhelm and help with youth engagement, the plan can and should include a blend of short- and long-term goals. The objective should not be to have all goal fields filled in all sections. Rather, have the plan reflect the youth’s current and future IL needs, wants, and goals in an iterative way.



“What IL assessment and plan information must be documented and where?”

When the child welfare professional completes an IL assessment with an IL-eligible young person, the CWP shall document its completion on the “Assessment/Plan” tab of the eWiSACWIS IL page. This includes recording the completion date and writing a short description of the process, tools, and methods, as well as main areas discussed. The CWP shall also upload a copy of the assessment to Images under the category “Independent Living>Assessment.”

Similar requirements exist for the IL plan. When the CWP creates an IL plan with an IL-eligible young person, the CWP shall document its completion on the “Assessment/Plan” tab of the eWiSACWIS IL page. This includes recording the completion date and writing a short description of the process, tools, and methods, as well as main areas discussed. The CWP shall upload a copy of the plan to “Images” under the category “Independent Living>Transition Plan.”

The CWP shall complete similar steps when they revisit the assessment and plan with the youth every six months. They shall record the date of the review/revision on the “Assessment/Plan” tab and, as applicable, upload any revised versions of the assessment or plan to the applicable Independent Living image category. It is not necessary to upload duplicate versions of the same assessments or plans; the CWP need only upload new and revised IL assessment and plan documents.

The screenshot displays the 'Assessment / Plan' tab of the eWiSACWIS IL page. The main content area is titled 'Independent Living Assessment and Planning' and includes fields for 'Updated By:' and 'County:'. Below these are two columns: 'Assessment Completed/Revised' and 'Plan Completed/Revised', each with a date input field set to '00/00/0000'. To the right, the 'Image Details' panel is open, showing a dropdown menu for 'Type' with options: 'Assessment', 'Other - Independent Living', 'Request to Determine Eligibility', 'Supervised Independent Living Document', 'Supporting Document', 'Transition Plan', and 'Verification Document'. The 'Assessment' and 'Transition Plan' options are highlighted with red boxes.



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