Creating a Provider Record from a Provider Inquiry

Knowledge Base Article

Table of Contents

Overview 3
Creating an Inquiry 3
Completing the Inquirers Tab 5
Completing the Address Tab 8
Completing the Referral Sources Tab 9
Completing the Optional Info Tab 11
Completing the Activity/Decision Tab 12
Linking the Inquiry to a Provider 16
Completing the Basic Tab 17
Completing the Provider Information Tabs 18
Completing the Provider Workload Screen 21

Creating a Provider Record From a Provider Inquiry

Overview

The **Ohio SACWIS Inquiry** screens contain information about people who have contacted your agency expressing interest in becoming a Foster and/or Adoptive parent, Relative and/or Non-Relative caregiver, or to inquire about a specific **Child of Interest**, including children available for Adoption.

The **Inquiry Process** is designed to allow users to enter and retrieve relevant information about potential providers and the progress that has been made for the inquiry, such as whether or not an application has been submitted.

In addition, the **Inquiry Process** will assist agencies in maintaining compliance with the **Multiethnic Placement Act (MEPA)** as it pertains to the Adoption, Foster and Kinship application process.

Ohio SACWIS **Home Provider** screens contain information about people who have applied to become a provider and the progress made during the home study / licensing process. To enter new home provider information, complete the following steps.

Creating an Inquiry

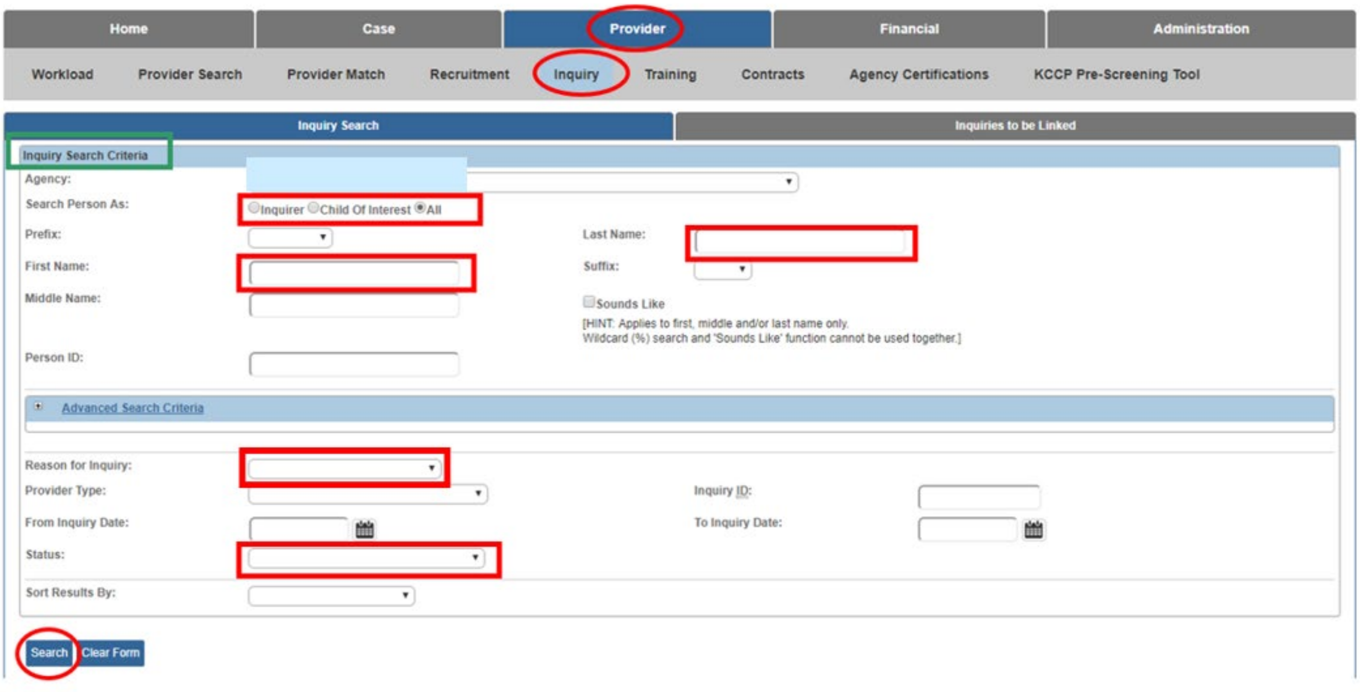
1. On the Ohio SACWIS **Home** screen, click the **Provider** tab.
2. Click, **Inquiry**
3. The **Inquiry Search Criteria** screen appears.
4. Your agency name will be pre-populated in the **Agency dropdown** field.
5. **Person Search Criteria:** displays **Search Person As:** User selects search options.

   Note: Inquirer, Child of Interest or All. System defaults to, **All**.
6. Enter a name in the **Last Name** field
7. Enter a name (if known) in the **First Name** field.
8. Enter filter criteria in the other fields, as needed.

   Note: The field, **Reason for Inquiry**, allows users to filter by **Provider Interest**, **Child of Interest**, or **Provider Interest/Child of Interest**.

   Important: The Inquiry **Status** defaults to blank.
9. Make a selection from the Status drop-down menu to narrow the search results.
10. Click, **Search**.

Creating a Provider Record From a Provider Inquiry



The results appear in the **Inquiry Search Results** section of the screen.

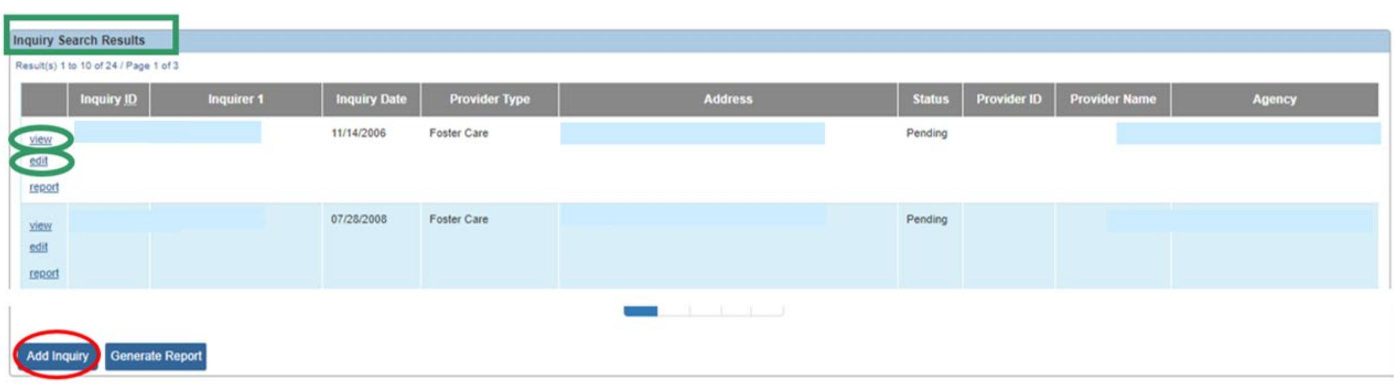
> **Note**: The Inquiry Search returns and displays the **Provider ID** and **Provider Name** on **ALL** inquiry records which are linked to a **Home Provider** or a **Non-ODJFS Provider**.

If the provider already exists in the system, users can:

- Click the **view** link to view the existing information.
- Click the **edit** link to modify the existing information.

  Important: Users can only **edit** inquiry records for which the **Status** column is marked as **Pending.**

> **Note**: Click, **Add Inquiry**, if the provider **does not** have a **Pending** inquiry for the logged in agency.



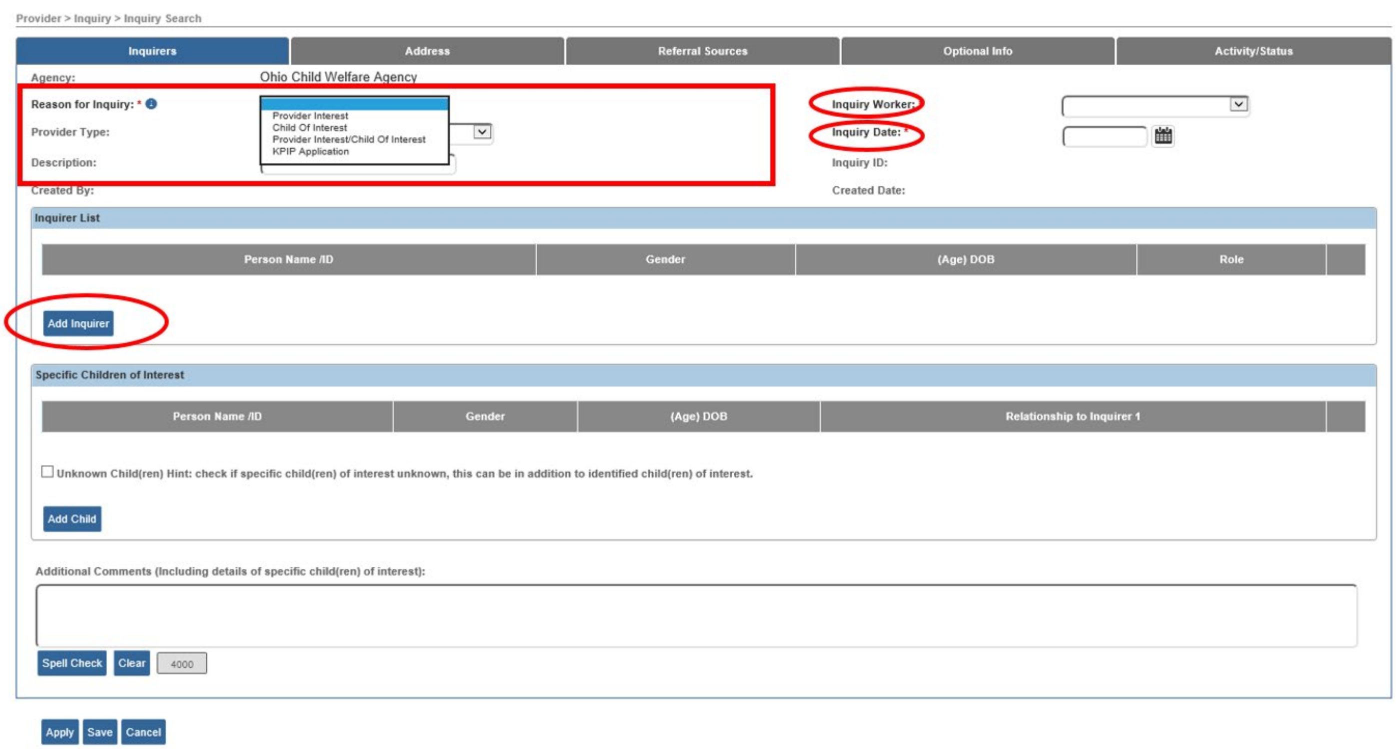
The **Inquirer** tab appears.

Completing the Inquirers Tab

1. Make a selection from the **Reason for Inquiry** drop-down menu (required).
   - **Provider Interest** = Inquiry to become a Home or Non-ODJFS Provider
   - **Child of Interest** = Inquiry for a **Specific Child of Interest** (will not lead to a creation of a Provider/Provider Type)
   - **Provider Interest/Child of Interest** = Inquiry to become a Home or Non-ODJFS Provider with a **Specific Child of Interest** identified. **NOTE:** This designation must be used to create a Kinship Provider Type.
   - **KPIP Application** = Inquiry to create a Provider record that is needed only to process a new KPIP Application

   Note: If the Reason for Inquiry is Provider Interest, Provider Interest/Child of Interest or KPIP Application, the **Provider Type** drop-down field is required.
2. Select the **Inquiry Worker** (required) from the drop-down list.
3. Enter the **Inquiry Date** (required).

   Important: The **Inquiry Date** will be locked upon the initial saving of the record. The date selected must be on or prior to the application received date and/or any activity date.
4. Click the **Add Inquirer** button.



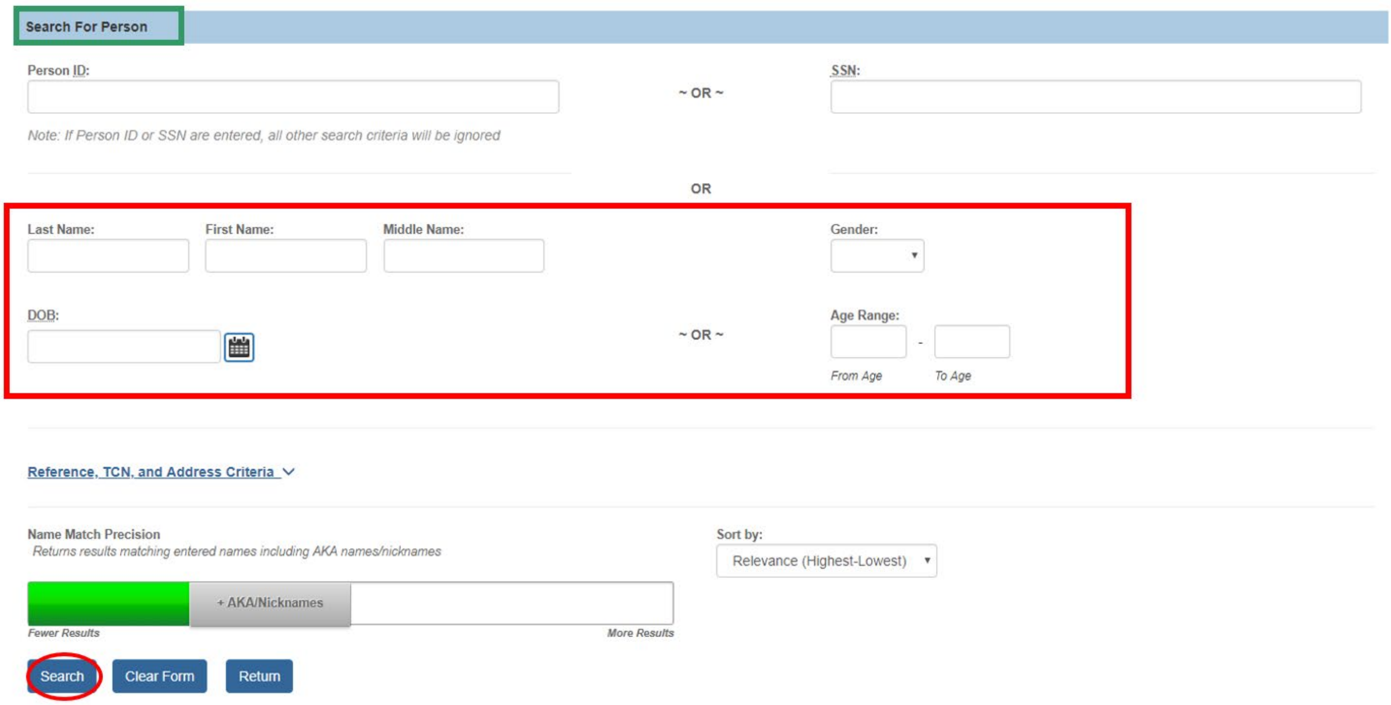
Creating a Provider Record From a Provider Inquiry

The **Search for Person** screen appears.

5. Enter the person's information into the filter criteria fields.

   Note: If you know a provider's **Person ID**, you can enter that number in the **Person ID** field rather than create a duplicate person or provider in the system.

6. Click, **Search**.

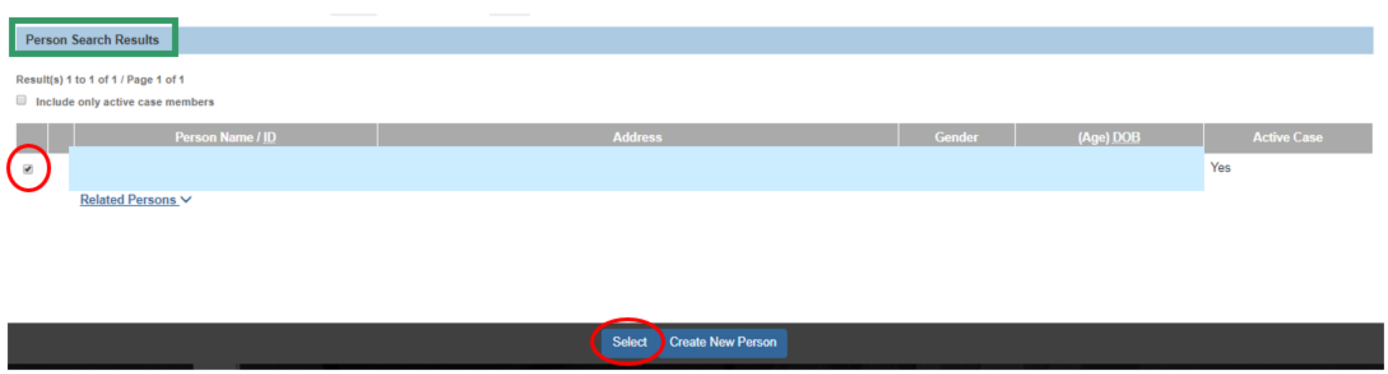


The results appear in the **Person Search Results** section at the bottom of the screen.

7. Click the check box beside the appropriate person's name.

8. Click, **Select**.

   Note: If the person is not already in Ohio SACWIS, create a new person record to link to the inquiry.



Creating a Provider Record From a Provider Inquiry

The selected person appears in the **Inquirer List** grid under the **Inquirers** tab.

9. Select the appropriate **Role** from the drop-down list. The Inquirer List must have one person with a role of **Inquirer 1**.

   Note: When the inquiry record is linked to a provider record, **Inquirer 1** will become **Applicant 1**.

10. For applicants interested in a specific child, click, **Add Child** in the **Specific Children of Interest** grid.

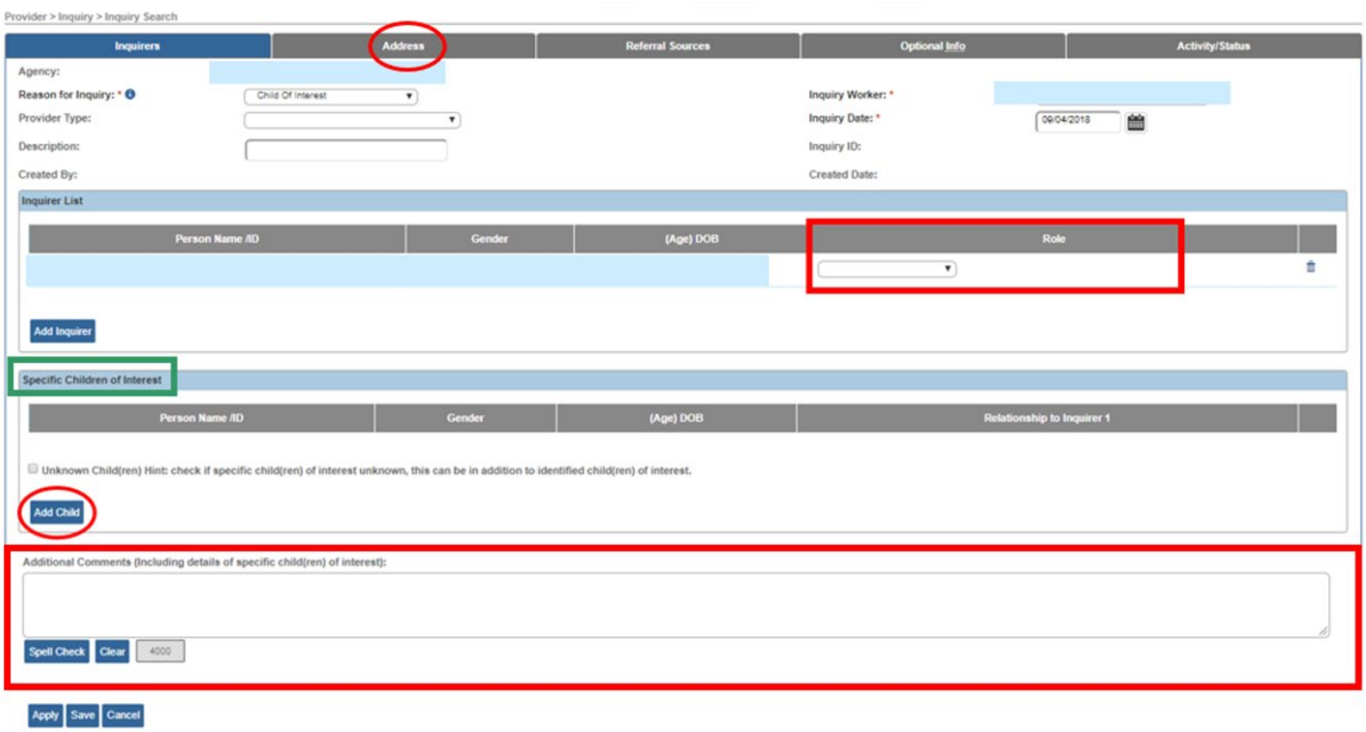
    - Repeat steps 5-9 to link a specific child to the inquiry.

    Important: **Enter a specific child's name with discretion.** Currently, adding a child's name in the **Specific Children of Interest** section may compromise a child's confidentiality in Ohio SACWIS.

11. Select the child's **Relationship to Inquirer 1** from the drop-down list.

    Note: Repeat steps, as needed, to add additional children to the **Specific Children of Interest** list.

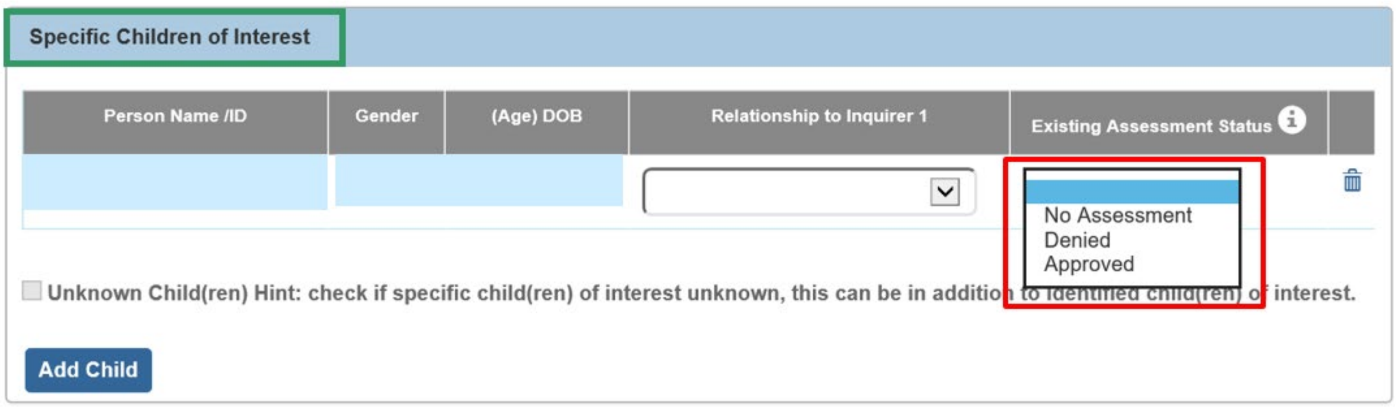
12. Check the **Unknown** checkbox, when appropriate. (Comments required.)
13. Enter **Additional Comments** as needed.
14. Click the **Address** tab.



Creating a Provider Record From a Provider Inquiry

Important: If completing a **KPIP Application** inquiry, the **Specific Children of Interest** grid will show an additional field of **Existing Assessment Status**. This will determine what type of Kinship Assessment the system will create.

- **No Assessment** = An in-progress initial kinship assessment will be created and a child-specific Kinship Provider Type with a status of ‘Pending’ will be present on the Provider record.
- **Approved** = A child-specific Kinship Provider Type with status of ‘Approved’ will be created on the Provider Record.
- **Denied** = A child-specific Kinship Provider Type with a status of ‘Denied’ will be created on the Provider Record.



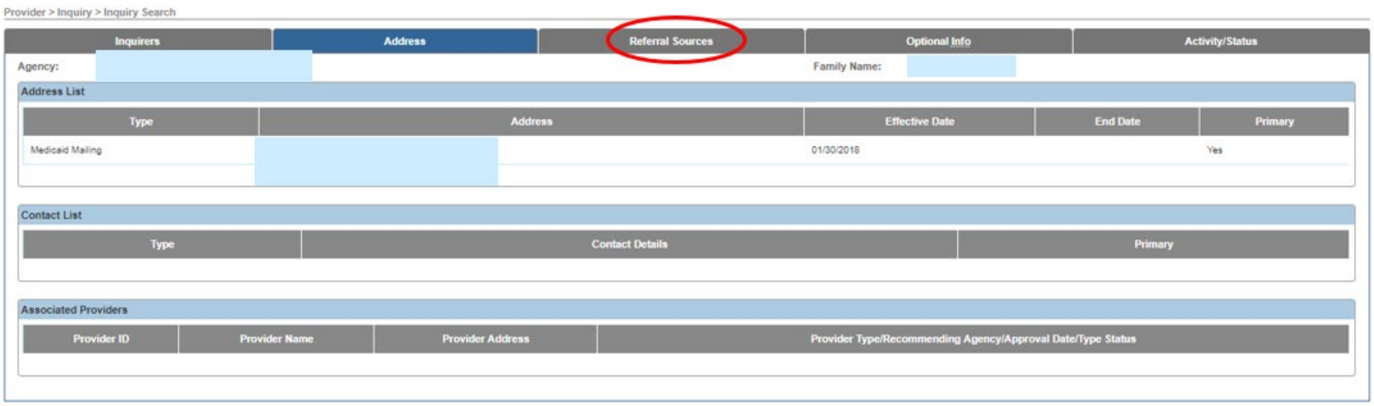
Completing the Address Tab

Note: This screen is view only and the fields auto-populate based on the inquiring person’s address on their **Person Profile** screen. If no address appears or a wrong address appears here, you must navigate to that individual’s **Person Profile** screen and then modify the information there.

To save the inquiry record, the **inquiring person must have:**

- Their address recorded in the system
- A primary contact listed. (**Yes** appears in the **Primary**).

1. Review the **Contact List** information, which can be edited through the person profile on the **Address** tab. (See the **Provider Information Tabs** sub-section of this KBA.)
2. Review the **Associated Providers** information, which is **view only** and lists current non-end dated members that exist in other provider records.
3. Click the **Referral Sources** tab.

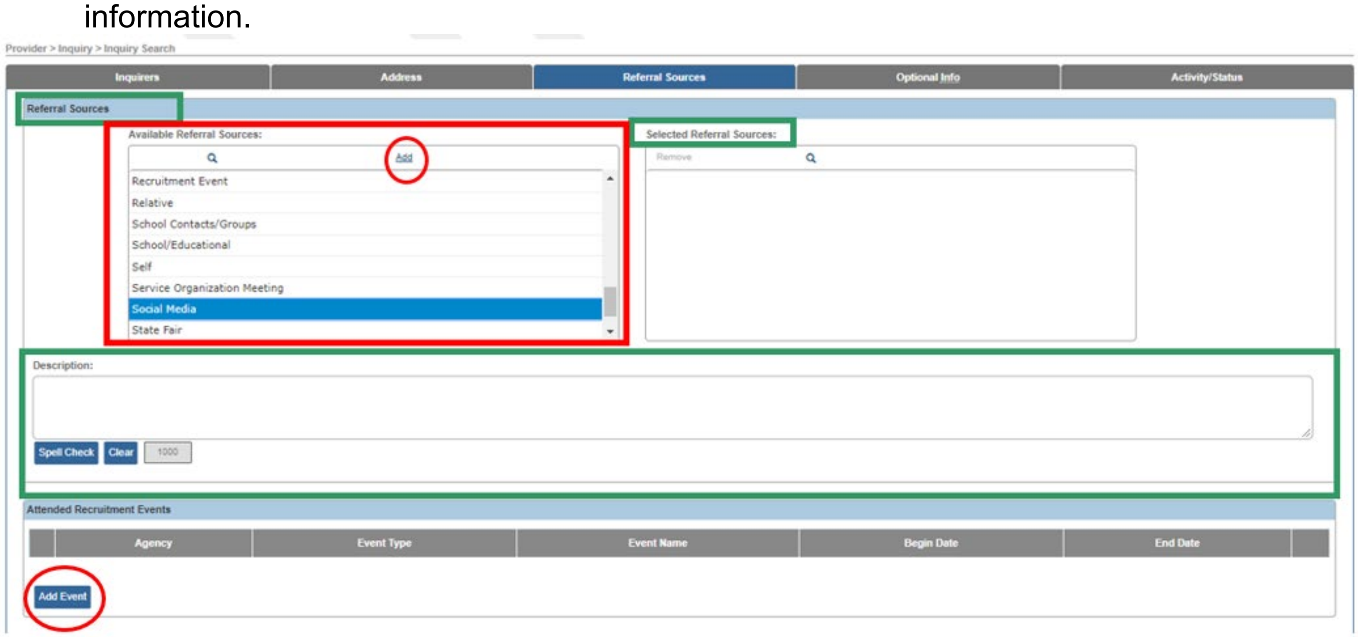


Completing the Referral Sources Tab

The **Referral Sources** screen appears.

Note: This screen shows how the inquiring person found out about becoming a provider.

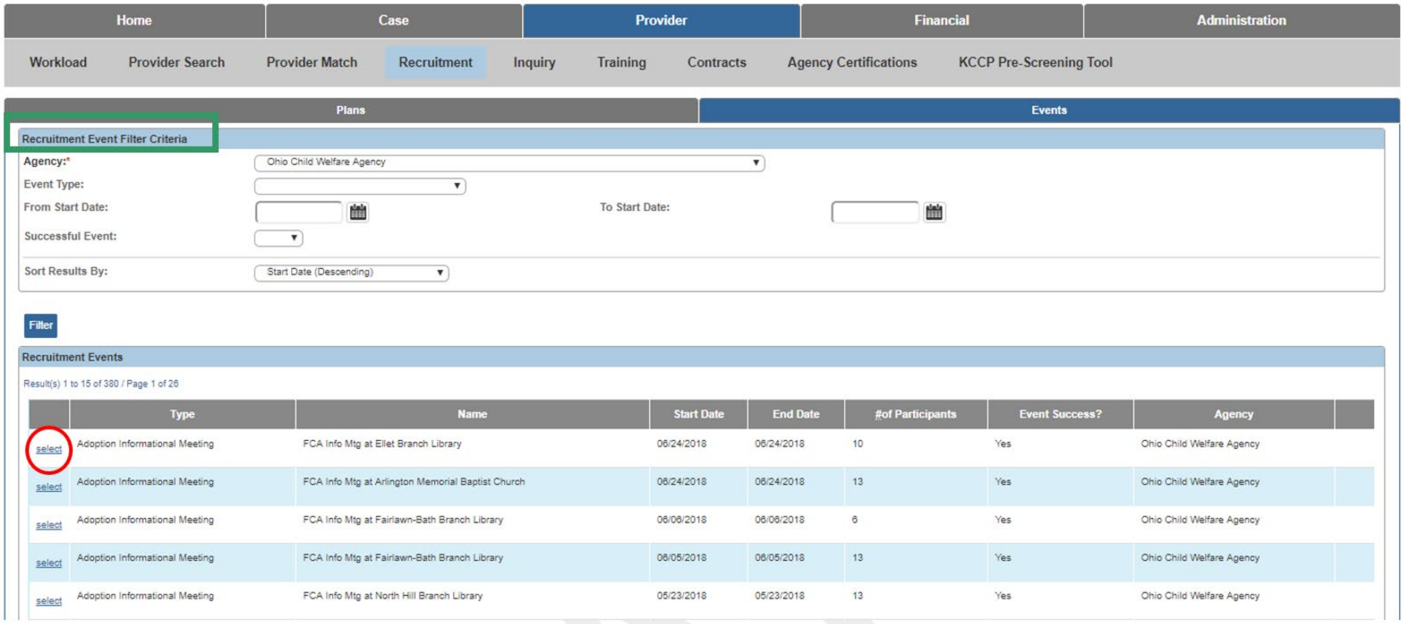
1. From the **Available Referral Sources** list, select the appropriate source(s). You can select more than one. **This is a mandatory field once the Decision status has been changed from Pending or Active**.
   Note: For Kinship Provider Types and KPIP Application Reason for Inquiry, the system will automatically populate a response of '**Self**' but can be modified as applicable.
2. Click, **Add**.
3. The source(s) will appear in the **Selected Referral Sources** field.
4. If necessary, complete the **Description**.
5. If the inquiring person attended a recruitment event, click the **Add Event** button to add the information.



Creating a Provider Record From a Provider Inquiry

The **Recruitment Event Filter Criteria** screen appears (as seen below).

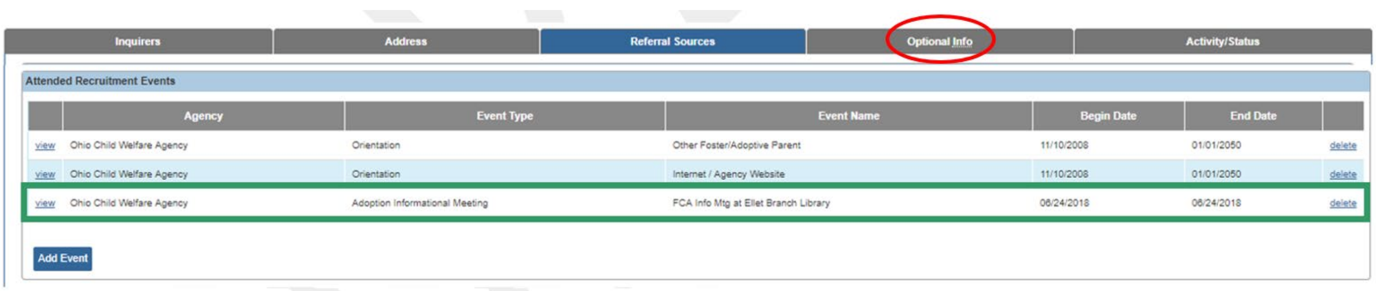
1. Click, **select**, beside the appropriate recruitment event.



The **Referral Sources** screen appears with the **Attended Recruitment Event** linked.

Note: Repeat **Steps 5-6** as necessary to link additional events.

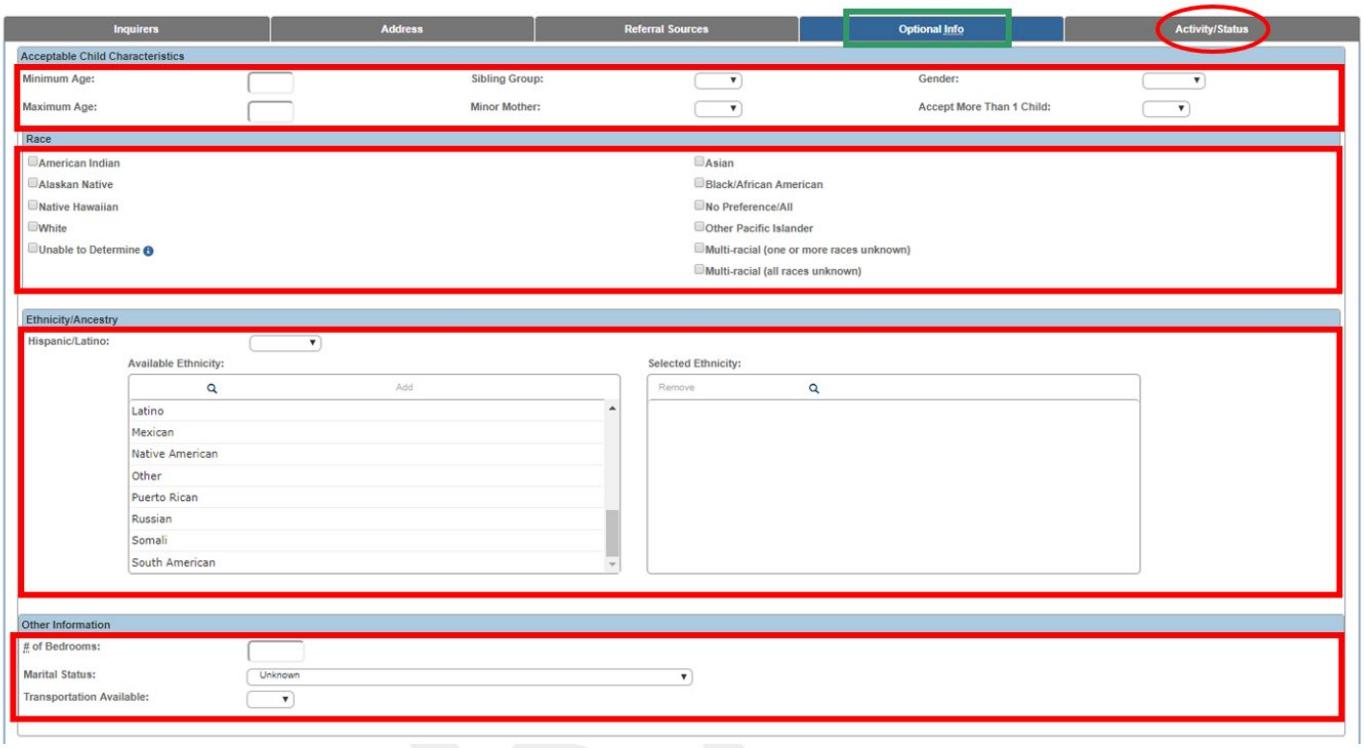
2. Click the **Optional Info** tab.



The **Optional Info** screen appears.

Completing the Optional Info Tab

1. Complete the fields on the screen, as needed.
2. Click, **Activity/Status**.



The **Activity/Status** screen appears.

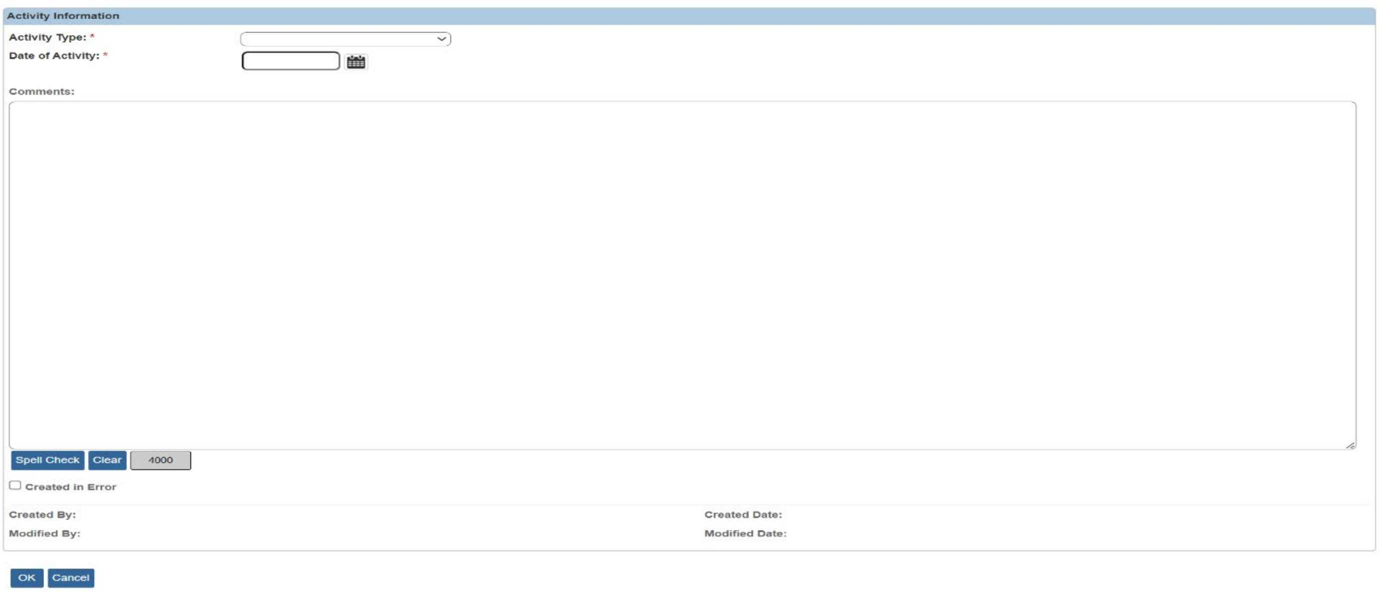
Completing the Activity/Status Tab

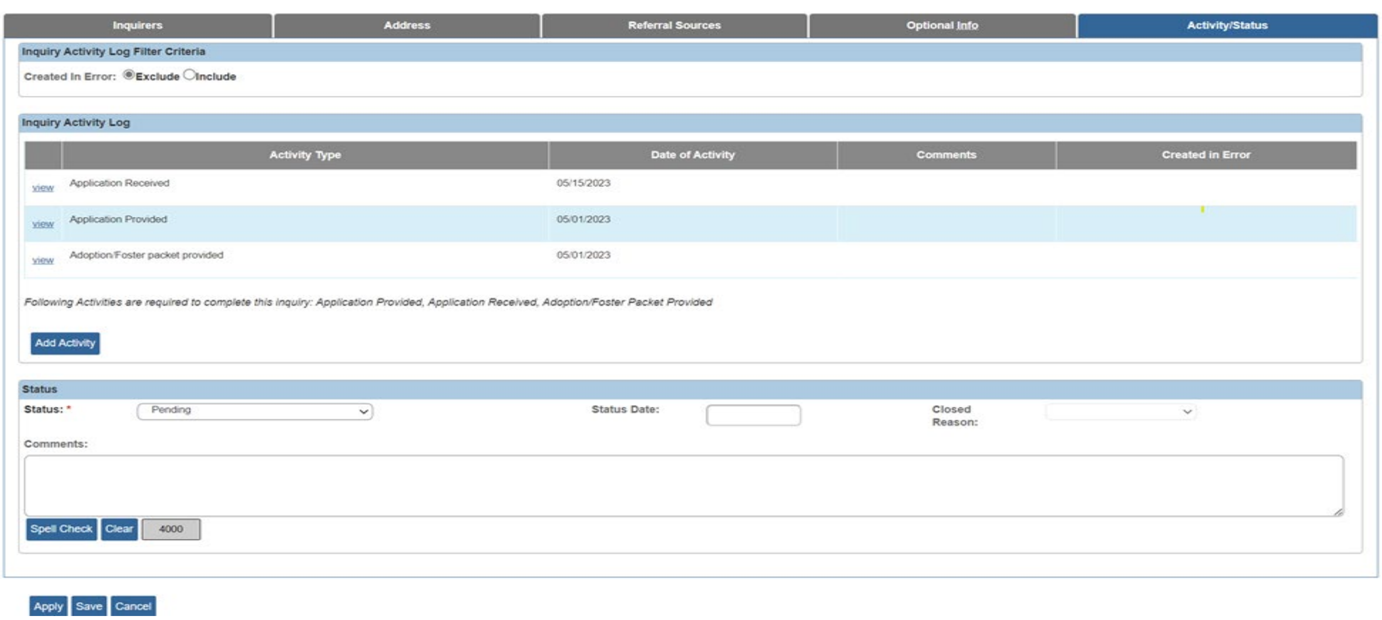
1. In the **Status** grid, the default selection will be, **Pending**. Keep that selection.
2. Click, **Add Activity** button.

Note: Under the **Activity Type**, required activities have been listed to aid agencies in selecting the appropriate types to compete the inquiry record.

The **Activity Information** screen appears.

3. Make a selection from the **Activity Type** drop-down menu.
4. In the **Date of Activity** field, enter the date the activity occurred.
5. If needed, enter comments in the **Comments** field.
6. Click the **OK** button at the bottom of the screen.



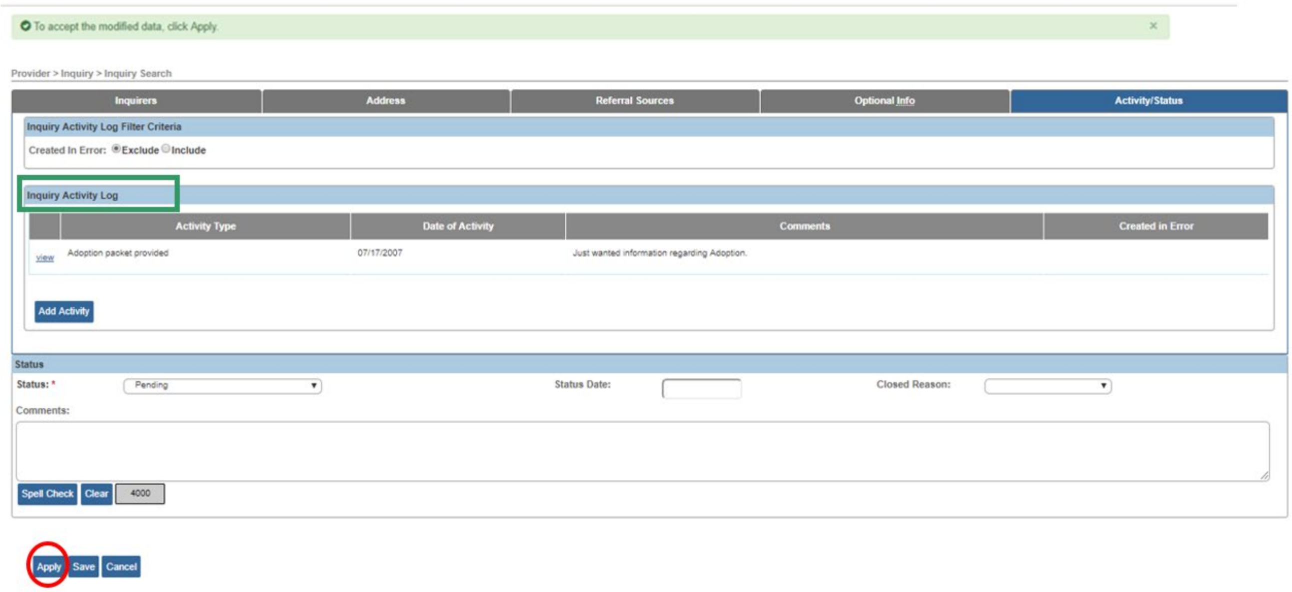


Creating a Provider Record From a Provider Inquiry

After clicking OK, the **Activity/Status** tab (Decision screen) appears, displaying the new information in the **Inquiry Activity Log** grid.

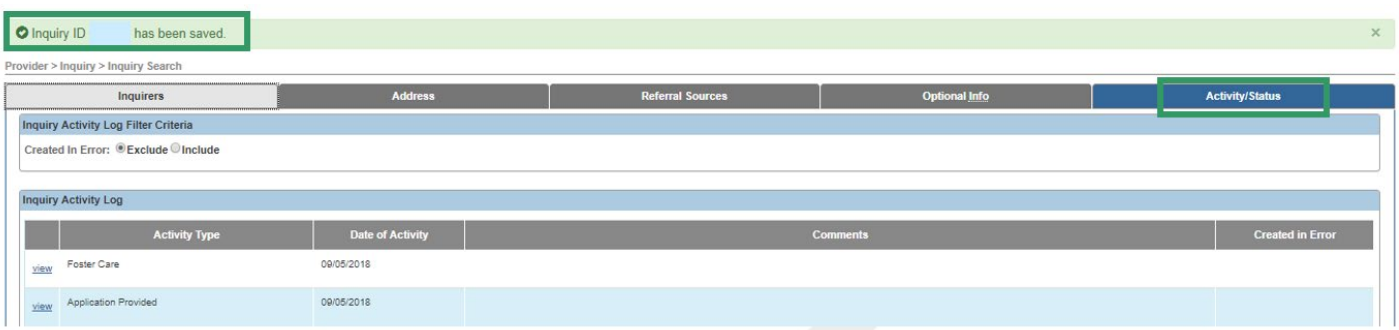
The **Activity/Status** screen appears.

7. Click, **Apply**.



The **Activity/Status** screen displays the following message at the top of the screen:

Inquiry ID ###### has been saved.



Important: Based on the Provider Type selected, certain Activity Types are required to complete the inquiry record. **Application Provided**, **Application Received**, and **either Adoption Packet or Adoption/Foster Care Packet** must be selected to complete the inquiry record.

Note: If a **KPIP Application** is the Reason of Inquiry, the system will automatically populate an Inquiry Activity Log of Application Received as of the Inquiry Date entered.

Creating a Provider Record From a Provider Inquiry

For Provider Types:
Adoption (ICPC), or Adoption Foster Caregiver Applicant (1692)

Required Activities:
Application Provided
Application Received
Adoption Packet Provided

For Provider Types:
Foster, Foster/Adoptive, Foster Care (ICPC), Foster Care/Adoption (ICPC)

Required Activities:
Application Provided
Application Received
Adoption/Foster Packet Provided

For Provider Types:
Adoptive Care-International

Required Activities:
Application Received

For Provider Types:
Kinship Care-Relative, Kinship Care-Non-Relative, Kinship Care-Relative (ICPC) or Kinship Care-Non- Relative (ICPC)

Required Activities:
None

For Provider Type:
Adoptive Out- of- State (when creating a non-ODJFS provider)

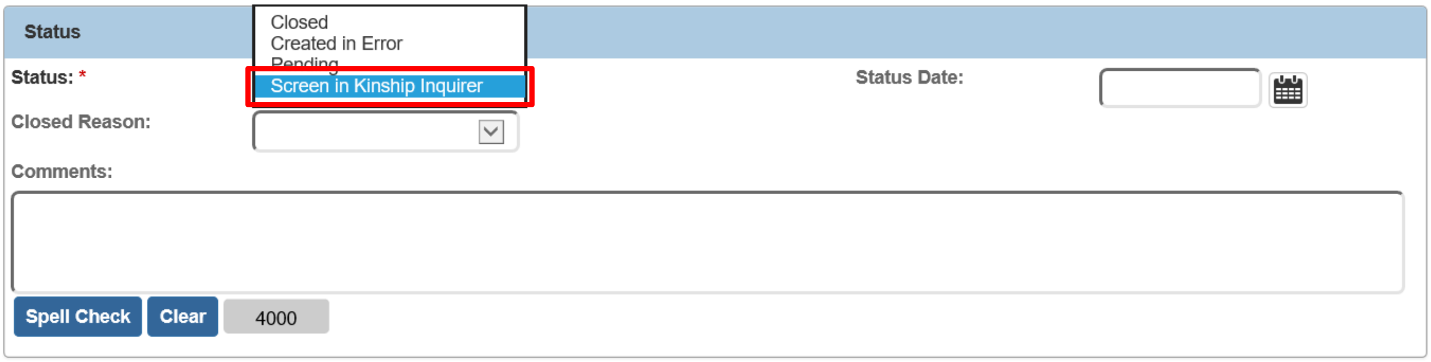
Required Activities:
Adoption Packet Provided

> **Note**: If an activity has been entered incorrectly, you can mark the activity **Created in Error** and re-enter the appropriate activity type and date.
>
> **Important**: The Inquiry Activity Log Filter allows users to Exclude and Include Created in Error Activities.

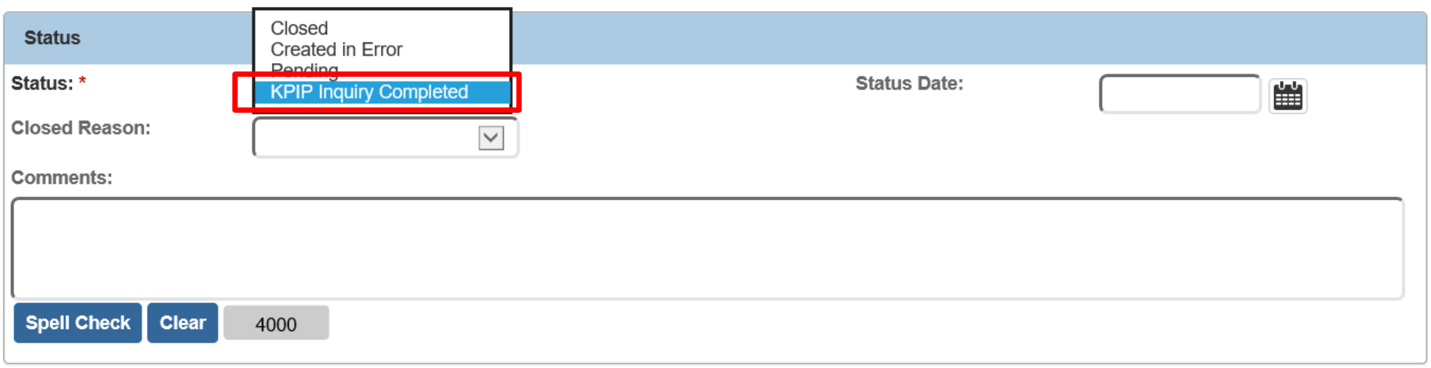
8. To complete the inquiry for all Provider types (excluding Kinship Provider Types), select **Screen In- Application Received** in the Decision field drop-down list.

   Important: The Screen In – Application Received selection is not available until AFTER an activity type of Application Received is recorded.

9. To complete the inquiry for Kinship Provider Types, select the status **Screen in Kinship Inquirer**



10. To complete the inquiry for a KPIP Application Reason for Inquiry, select the status **KPIP Inquiry Completed**



Once the Decision type of Screen in-Application Received, Screen in Kinship Inquirer or KPIP Inquiry Completed is saved, the inquiry becomes a completed inquiry. An inquiry must be completed before you can link it to a provider.

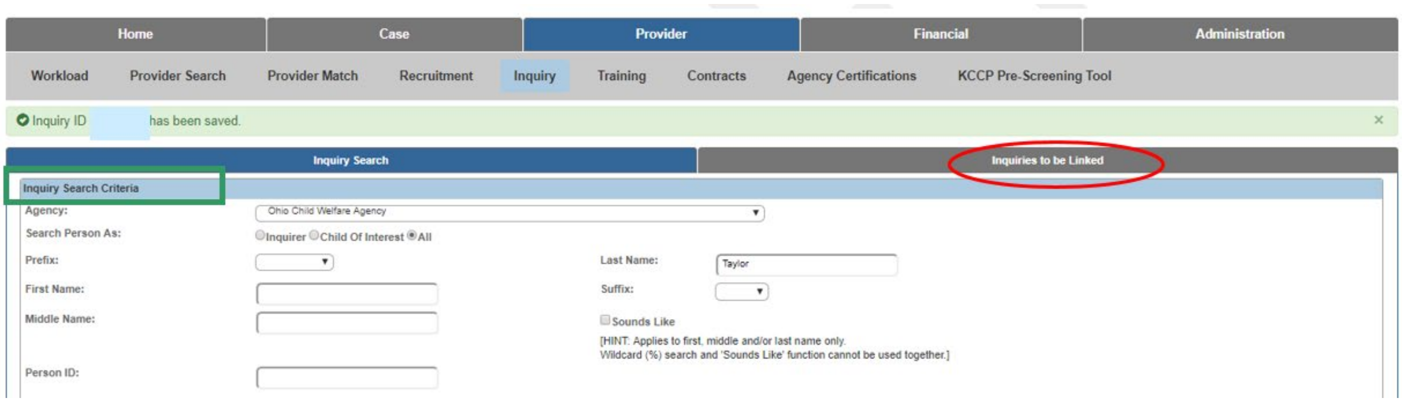
11. Click, **Save**.

The **Inquiry Search Criteria** screen appears.

Linking the Inquiry to a Provider

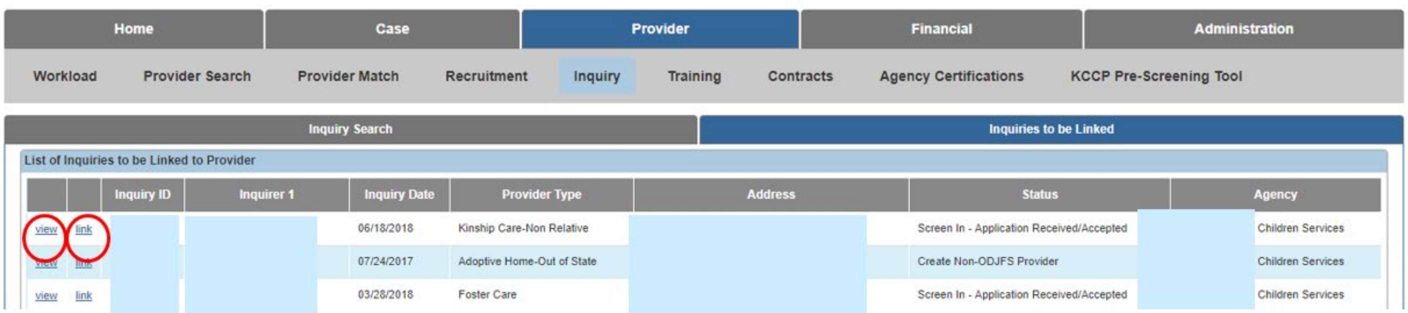
1. To link the completed inquiry to a provider, click the **Inquiries to be Linked** tab.

Creating a Provider Record From a Provider Inquiry



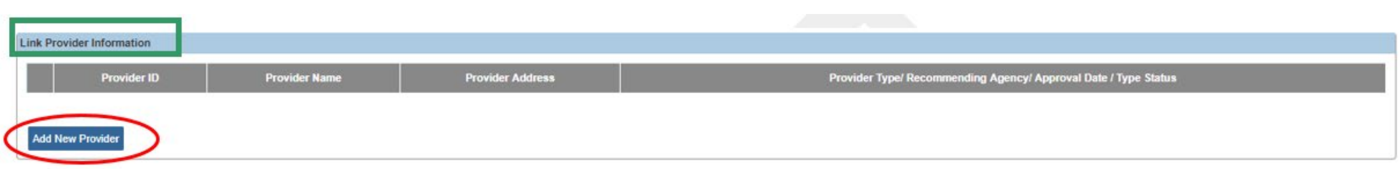
The **List of Inquiries to be Linked to Provider** screen appears.

2. Click the **View** hyperlink to review the inquiry.
3. Click the **Link** hyperlink to link the inquiry to a **Provider**.

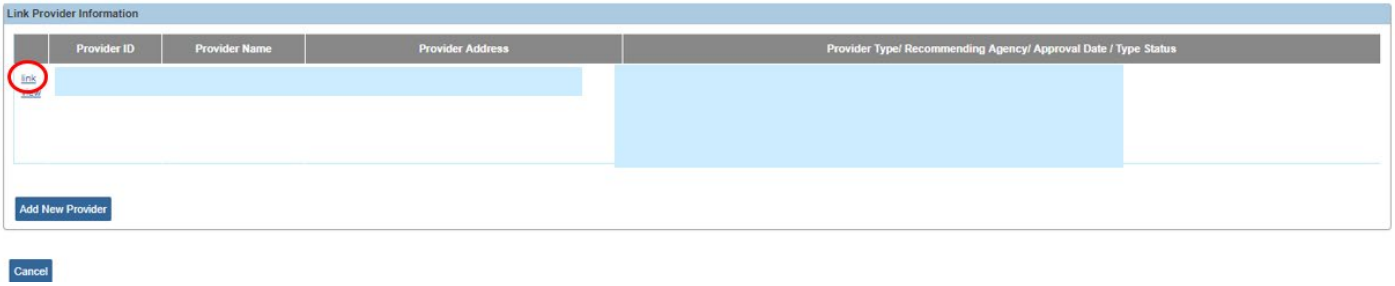


The **Link Provider Information** screen appears.

4. If no provider record exists for the **Person ID** listed on the inquiry, click the **Add New Provider** button.



5. If a provider record does exist, click the **link** hyperlink next to that provider.



The **Manage Provider Details** screen appears, defaulted to the **Basic** tab.

Completing the Basic Tab

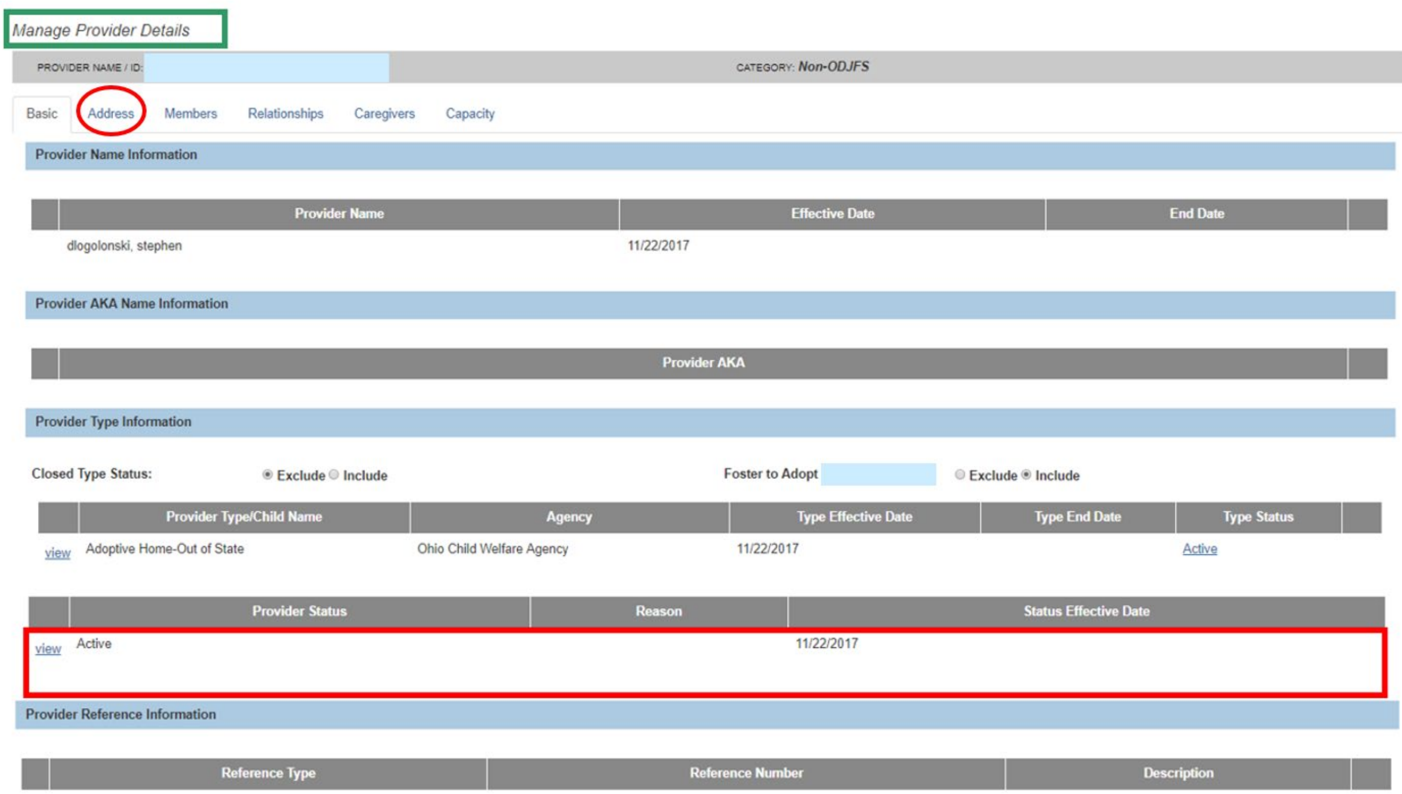
1. Edit the **Provider Status** and **Status Effective** date as needed.

   Note: Information automatically populates in the other fields.

2. Click the **Address** tab.

   Note: The provider address cannot be edited until a home study or kinship assessment is created in **Pending** status.

   Note: Contact the Help Desk if linking the inquiry did not assign a user to the provider.

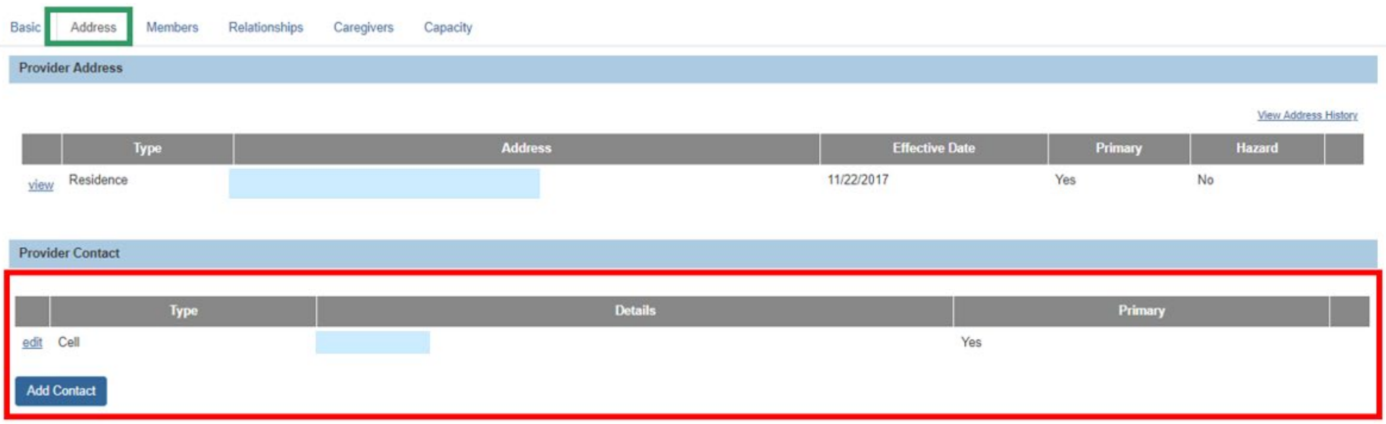


The **Address** tab screen appears.

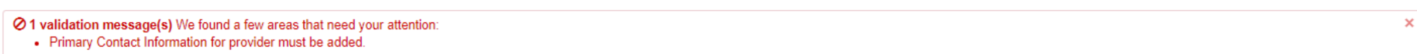
Completing the Provider Information Tabs

1. Verify the **Provider Contact** section is complete.

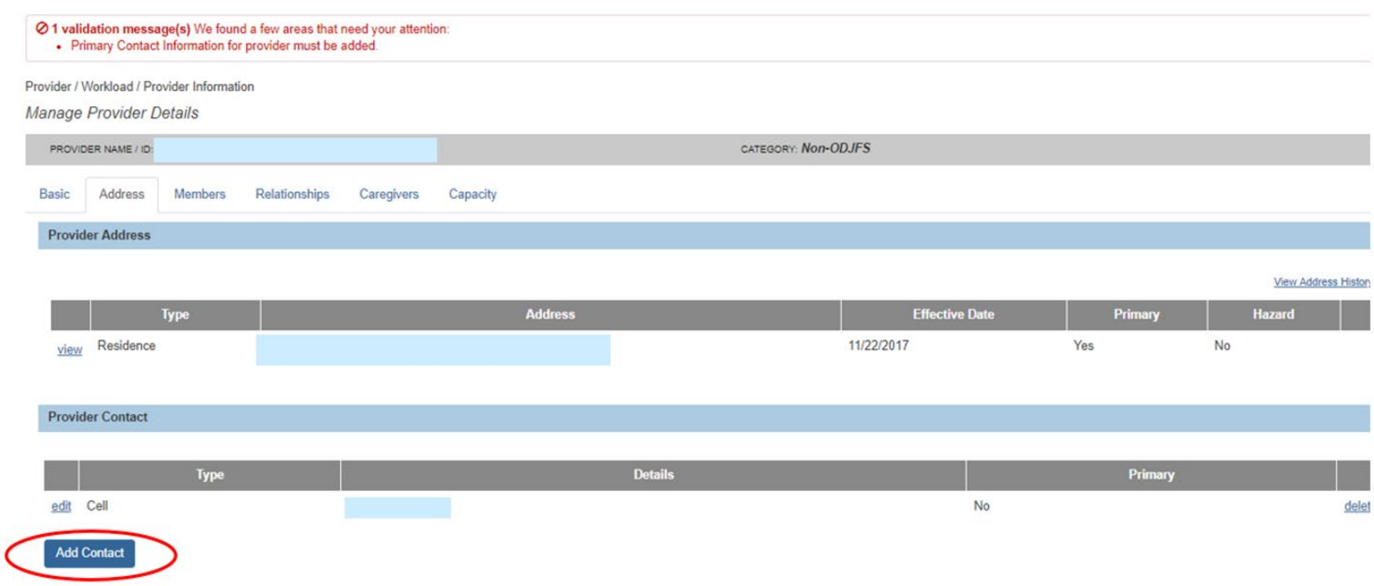
   Important: Both the **Provider Address** and **Provider Contact** sections must have a record with the **Primary** box checked to save the record.



   Note: If the Provider Contact section is incomplete, the following warning message appears upon save (example):

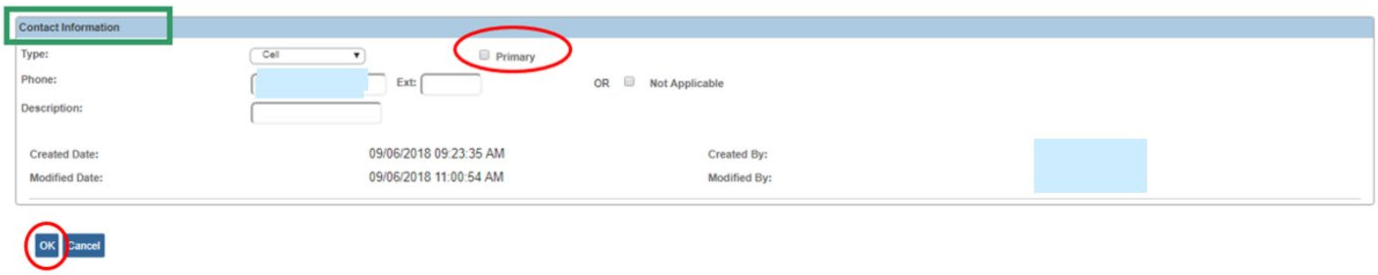


2. If there is no existing primary contact information, click the **Add Contact** button.



The **Contact Information** screen appears.

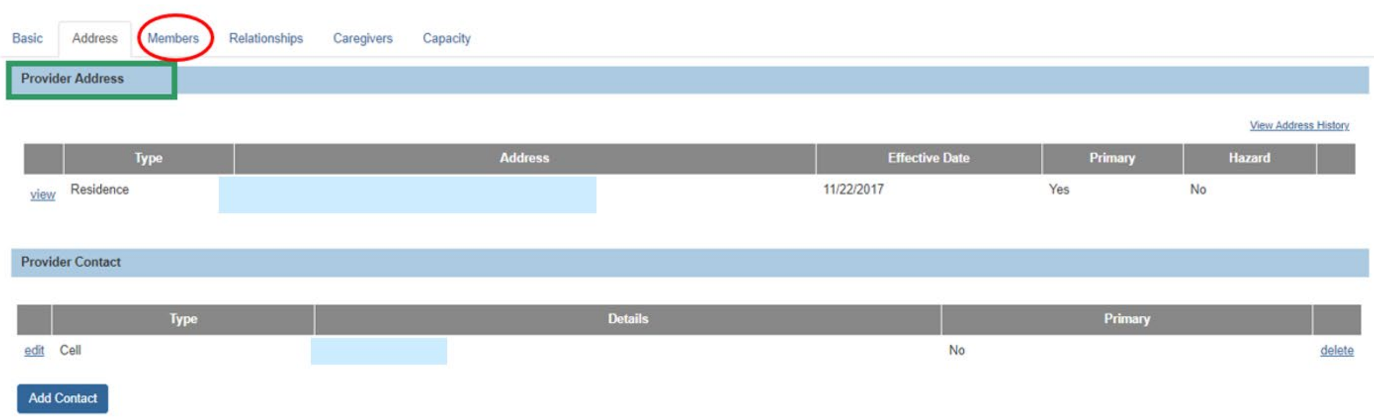
3. In the **Type** field, select the primary contact type from the drop-down list.
4. Click the **Primary** check box.
5. Fill in the other fields, as needed.
6. Click, **OK**.



Important: If this box is not checked, the previous screen will not show **Yes** in the **Primary** column and you cannot save the record.

The **Provider Address** screen appears, displaying the populated **Provider Contact** section. The **Primary** column displays a **Yes** if the **Primary** check box was selected.

1. If the **Provider Contact** information was previously entered, but the **Primary** column does not say **Yes**, click **edit** and then click the **Primary** check box.
2. Click the **Members** tab.



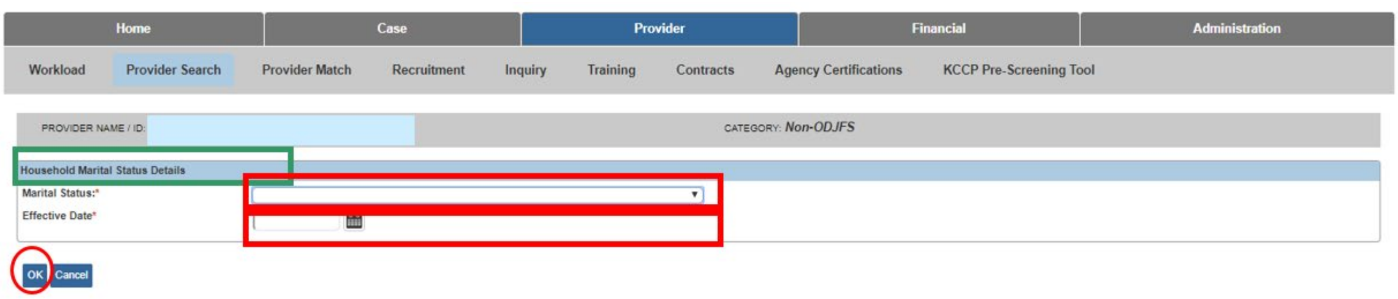
The **Current Active Members** screen appears.

1. Verify the **Household Marital Status** section is complete.

   Important: The **Household Marital Status** section must have a record identifying the Provider's marital status to save the record.
2. If there is no existing marital status information, click the **Add Marital Status** button.

The **Household Marital Status Details** screen on the **Provider** record appears.

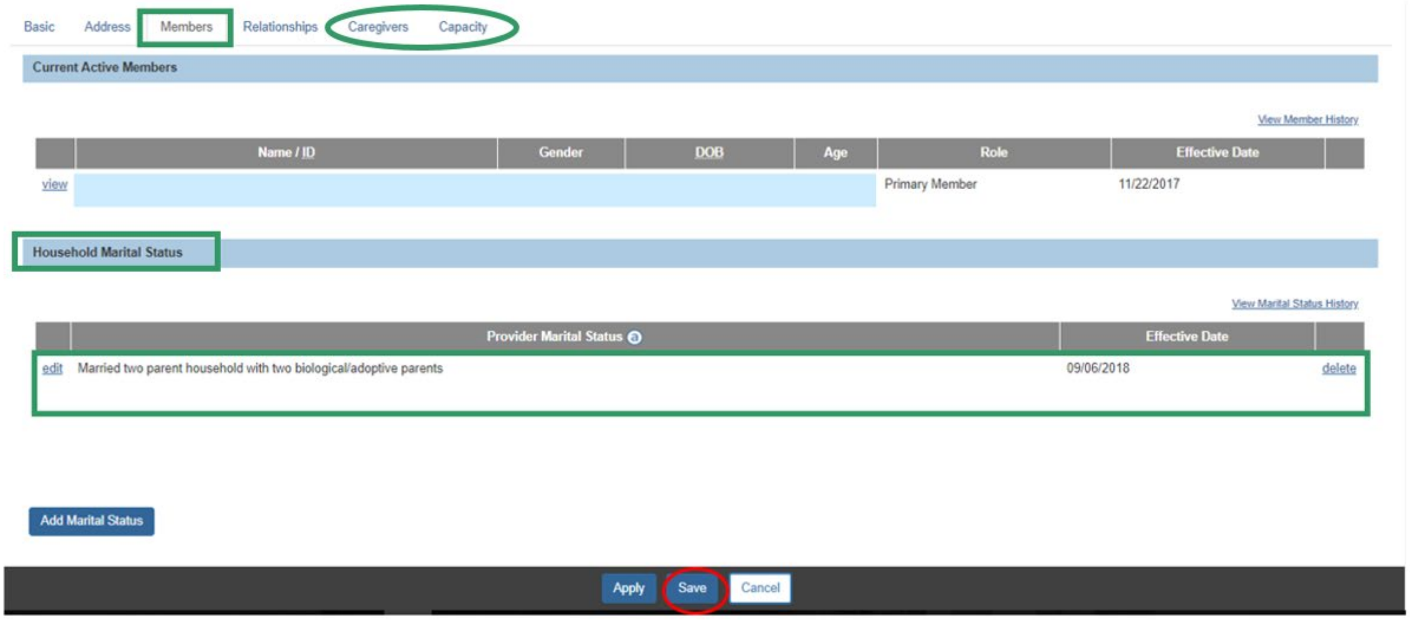
3. In the **Marital Status** field, select the appropriate status from the drop-down list. (Required)
4. In the **Effective Date** field, enter the effective date of the selected Marital Status. (Required)
5. Click the **OK** button.



The **Members** tab appears displaying the new information in the **Household Marital Status** grid.

Note: The **Caregivers** and **Capacity** tabs cannot be edited until a home study/kinship assessment is created in **Pending** status.

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



The **Provider Overview** screen appears showing your data has been saved. From this screen, you can add activity logs, create home studies, access provider training history, etc.

7. When complete, click the **Close** button.

   Note: Users may have different levels of edit capabilities from the **Provider Overview** screen, based on security, as well as the provider type status.

Completing the Provider Workload Screen

Once the inquiry is linked to a provider, it will appear on your workload list as shown below.

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