Ohio Certification for Agencies and Families (OCAF)

Agency User Guide

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Ohio | **Department of Job and Family Services**

Last Revised: 02/15/2023

Overview

This article describes how to enter an inquiry for Foster Care and/or Adoption in the Ohio Certification for Agencies and Families (OCAF) system and have prospective resource families complete a JFS 01691.

Getting Started

To gain access to the OCAF system, you must submit a completed JFS 7078 to SACWIS_Access@jfs.ohio.gov.   Enter the appropriate role on the form based on the type of agency you are employed by:

Role Name	Agency Type Access
EIDMX_JFS_S - OFC – OCAF Private Agency Worker	Private Agency
EIDMX_JFS_C - OFC – OCAF County Agency Worker	Public Agency

Private agency users will require a paper 7078 to be submitted while the digital 7078 can be utilized by public agencies users. Upon approval, an email will be sent by the Automated Systems Help Desk with details on how to log-in to OCAF.

MyOhio Access

 After the user is properly provisioned for access to OCAF, begin by accessing MyOhio. Navigate to the apps. Locate and click on the tile for JFS Salesforce Apps.
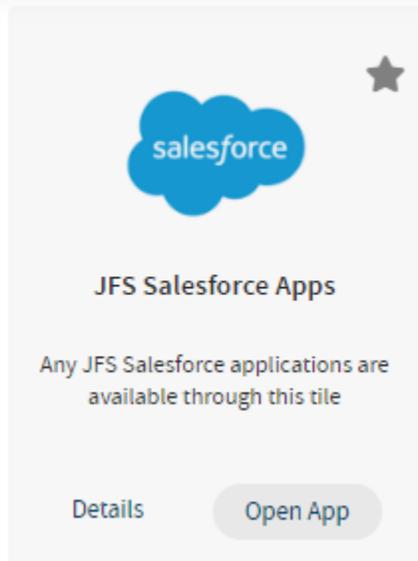

Helpful Hints About the OCAF System

- You may use the web browser back arrow button to return to the previous screen or navigate between record tabs within Salesforce.

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- All items in blue font contain a hyperlink to something else. Click on it to navigate to the corresponding information page.
- On the **Accounts**, **Contacts**, **Individual Applications**, and **Cases** (represents **Inquiries**) page, each contains a list view that can be changed and pinned for your convenience. The drop-down arrow next to the list can be changed. To keep that list, click the pin symbol.
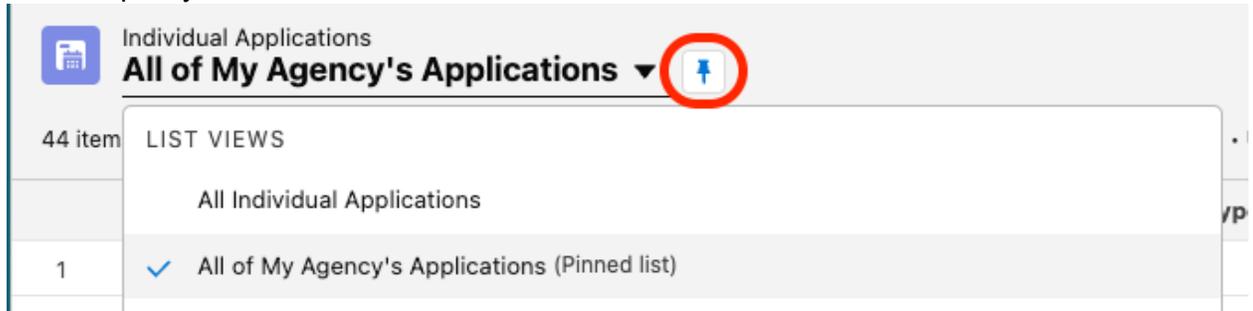
Navigating OCAF

After logging into the system, the tabs at the top will guide you through the different work items
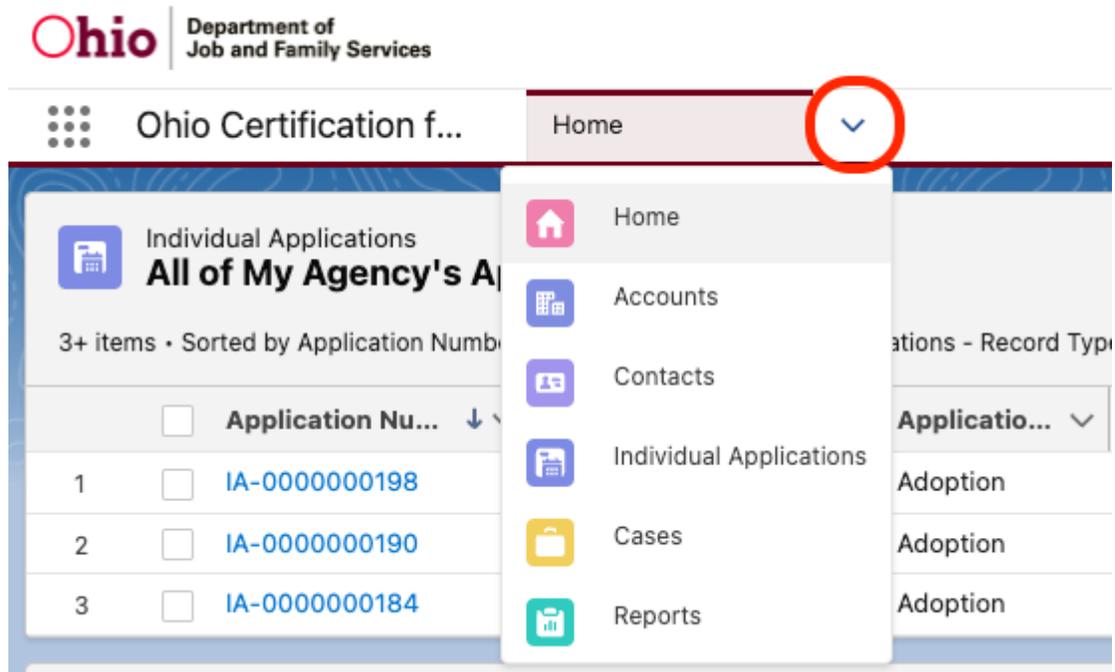
in OCAF.

Home Tab

The **Home** page will be the initial screen presented each time you login to OCAF. It will display:

The list of **Child Placement Applications** (commonly known as the JFS 01691) submitted to your agency.

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The grid across the top will provide helpful information about each record:

- **Application Number** – Clicking this blue hyperlink will navigate you into the Individual Application record
- **Household** - Clicking this blue hyperlink will navigate you to the Applicant's Household record
- **Application Type** - Each submitted application will have a designation for Foster Care, Foster Care and Adoption, or Adoption.
- **Application Status** – The system has multiple statuses which will indicate where in the process each application is:
    - *Agency review*: Application was submitted to your agency and needs to be reviewed for approval.
    - *Incomplete:* Your agency has reviewed the application and returned it to the applicant(s) as it was incomplete.
    - *Review Complete*: Your agency has reviewed the application and approved it. Your final approval of the application starts the clock for the Home Study to be completed.
    - *Withdrawn*: The applicant may withdraw an application if they choose not to move forward in applying or becoming licensed.
    - *Withdrawn - Closed by Agency*: The application was previously completed, but the applicant has decided to withdraw the application. Agency helped the Applicant Withdraw the already approved application.
- **Most Recent Submission Date/Time** – Documents the day and time when the application was last/most recently submitted.
- **Agency** – Indicates the Agency name the application was submitted to.
- **Created Date/Time** - Documents the day and time that the application was initially created by the applicant.

On the Home page, users will also find the **OCAF Dashboard** where the system displays high level Application and Inquiries statistics for their Agency. The dashboard visualizes the number of Applications and Inquiries within each status. To get more details about the application or inquiry, users can click on the View **Report** link under each of the widgets.

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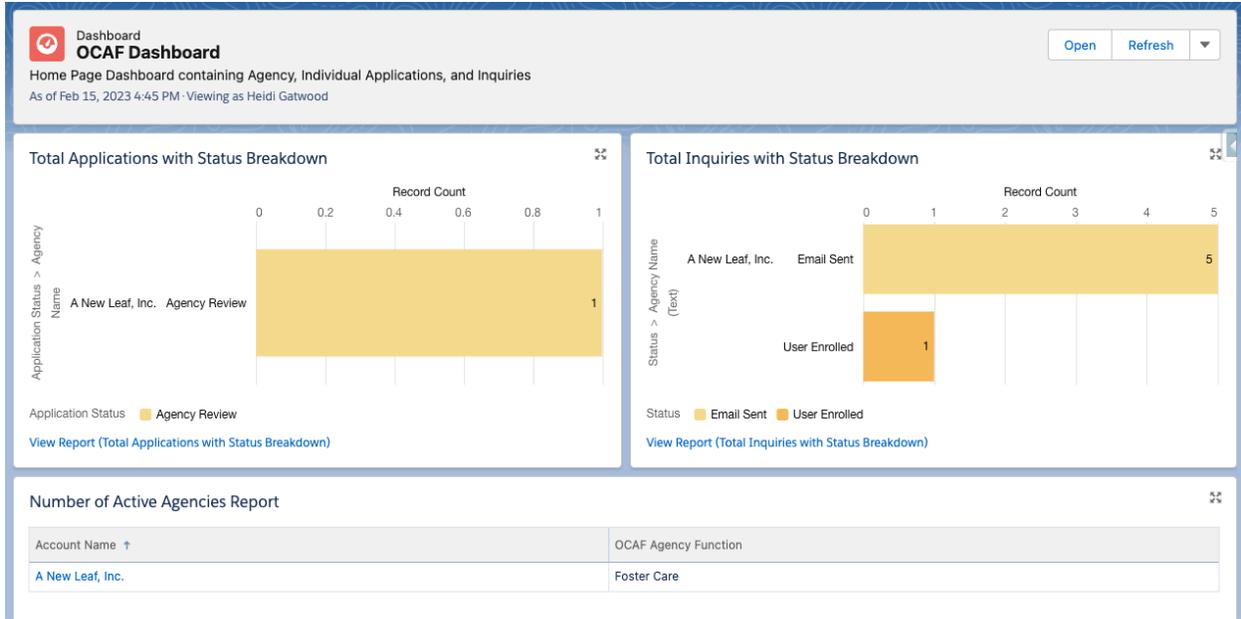
Accounts Tab

The **Accounts** tab will display active households that have submitted an application to your agency.

Individual Applications Tab

The **Individual Applications** tab displays a list of the applications submitted to your agency.

Cases Tab

The **Cases** tab displays inquiries submitted online or by agency workers for your specific agency.

Reviewing an Application

From the **Home** tab or the **Individual Applications** tab, click on the application number to open the submitted application.
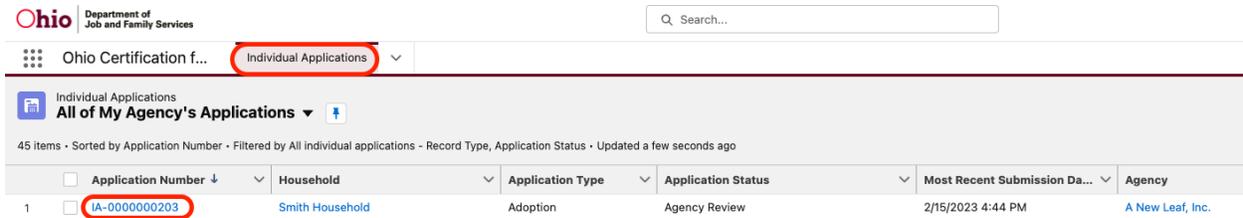
The Application's **Details** tab appears, along with a bar of additional tabs to guide you through the entire Application.

Assign the Application

Update the Ownership of the Application to assign for review. On top of the application page, click on the **Change Owner** button.
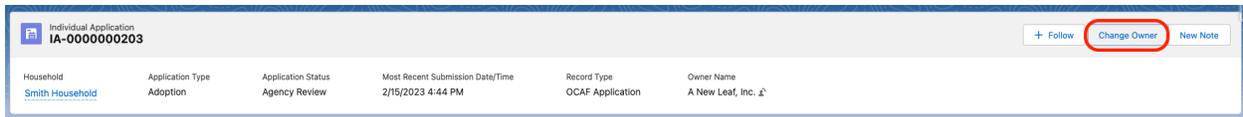
Search and select your name, or the name of the individual you wish to assign, and click **Submit**. The application is now successfully assigned.

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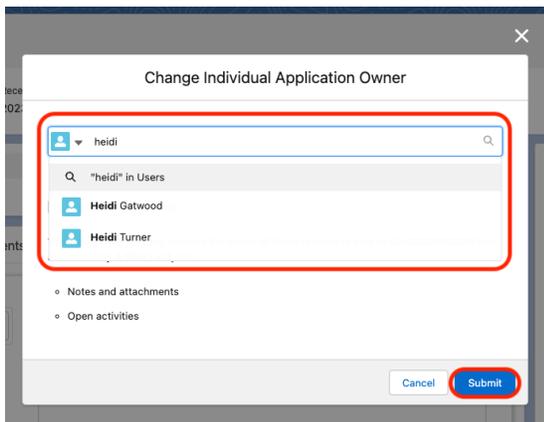
Details

The **Details** Tab will contain **Household** information, **Agency** information, Applicant Signatures, and general submission information.

Details	Applicants	Household Members	Home Arrangements	Interest & Experience	References

Household Smith Household	Application Status Agency Review
Initial Submission Date/Time ⓘ 2/15/2023 4:44 PM	Reason withdrawn by Agency
Most Recent Submission Date/Time ⓘ 2/15/2023 4:44 PM	Agency A New Leaf, Inc.
Date Application Review Completed	Application Type Adoption
Submission Count ⓘ 1	How were you Referred to Agency
All Applicant Names Charles Smith	
Directions to Your Home from Agency	

∨ Applicant Signatures

Applicant 1 Signature	Applicant 4 Signature
Applicant 1 Signature Name	Applicant 4 Signature Name
Applicant 1 Signed Date	Applicant 4 Signed Date

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Applicants

Under the **Applicants** Tab, you will see background history of all applicants. By default, Applicant 1's section opens up. Click on each Applicant's accordion to expand their information. Each **Applicant**'s tab will contain the following sections:

- **Applicant**
- **Military History**
- **Criminal History**
- **Residential History**
- **Employment History**
- **Marital/Relationship History**

Review each section for every Applicant. Each blue hyperlink below will navigate you to additional details entered by the respective Applicant.

Details	Applicants	Household Members	Home Arrangements	Interest & Experience	References

∨ Applicant 1

Applicant 1 (1)

Applicant Name ↑	First Name	Last Name	Email Address	Cell Phone
A-000275	Charles	Smith	✉ charles.smith@sample.com	(111) 111-1111

Military History (1)

Background History Name	Military Branch	Date Entered Military	Date Discharged	Type of discharge	Explanation for Other...
B-000880	Navy	2/1/2023	2/28/2023	Other	Example Other

Criminal History (1)

Background History ...	Offense	City of Offense	State of Offense	Convicted?	Date of Convictio...	Sentence
B-000879	Example Offense 1	Columbus	OH	Yes	2/1/2023	Sentence Example Here

Residential History (2)

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Household Members

The **Household Members** Tab will display all Household Members, including their demographics and criminal history (if entered).

Review Household Member information. Each blue hyperlink below will navigate you to additional details entered for the household member.

Details	Applicants	**Household Members**	Home Arrangements	Interest & Experience	References

Household Members (1)

Applicant Name	First Name	∨	Last Name	∨	Email Address	∨	Cell Phone	∨
A-000276	Jessica		Smith		✉ jessica.smith@sample.com			

Criminal History (0)

No Records Found !

Home Arrangements

Under the **Home Arrangements** Tab, you will see information on **Sleeping Arrangements**, **Description of Home**, and **Vehicles**.

Review the Home Arrangement Information. Each blue hyperlink below will navigate you to additional details regarding the sleeping arrangement/room description.

Details	Applicants	Household Members	**Home Arrangements**	Interest & Experience	References

Sleeping Arrangements (1)   New

OCAF Sleeping Arrangement Name	Bedroom Number	Floor/Level	Occupant(s)	
S-000112	1	Second	Charles	▼

View All

Description of Home

Does any family member smoke?	Is smoking allowed in the house?
No	No
Are there any pets in the home?	Description of Pet(s)
Yes	Dog
Do pets meet local safety requirements? ⓘ	Explain if Safety Requirements not met
No	Vaccination
Do you operate Business from residence?	Adult/Child Care or Rooming House?
Yes	Yes
Business Description	Business Impact on Foster/Adopt Plan
Online Business	No Impact
Applicant(s) have living adult children?	Willing to obtain Crib?
No	Yes

Vehicles

Type of Vehicles	
One Car	
Are vehicles in operable condition?	If Vehicle not Operable, please explain
Yes	Not Applicable
Are there infant car seats?	Are there toddler car seats?
No	No
Name of Insurance Company	Proof of Insurance for all vehicles?
All State	Yes
Access to Public Transportation?	If yes, Miles to nearest Bus or Transit

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Interest & Experience

Under **Interest & Experience** Tab, you will see the application details of **Type of Child Considered** and **Experience with Children** to review.

References

The **References** Tab will list Relative and Non-Relative **References** and **Adult Child References** if applicable.

Review the Reference Information. Each blue hyperlink will navigate you to additional details regarding the referent.

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Files

Additionally, an Agency Worker can find an Exported Application PDF (Form 01691) as well as supporting documents submitted by the applicant under **Files** on the right side of the application page.

To open the content of the application, click on the title of the document. A previewer will load the content within the system.

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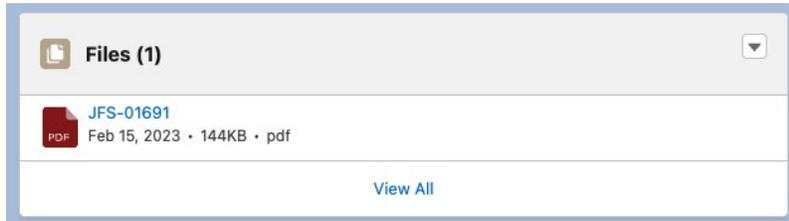
Approving/Returning an Application

After a full review of all the tabs and links in the application:

1. Return to the **Details** tab of the Application.
2. Click the pencil icon next to or double click the **Application Status** field.
3. Select the appropriate Status selection. The checkmark on the top bar will indicate the current status.
   - Choose **Incomplete** if there are things missing and you need applicant(s) to add more information. This will return the application to the applicant so they can complete your suggested requirements.
   - Alternatively, select **Review Complete** if, after review, all details are complete and accurate. This will lock the application and make it view only.

4. After selecting your Status, click **Save**.
5. A system generated email will be sent to Applicant(s) based on the updated status. This will be the indicator to the applicant(s) of application status.

6. Once the application has been marked as **Review Complete**, proceed in Ohio SACWIS with next steps to begin the Home Study process.

Sending an Email to Applicant(s)

1. From the Individual Application **Details** page, view the right side of the screen. There is a section for **Activity** and **Chatter**. Within the **Activity** tab, click where it says **Write an Email …**
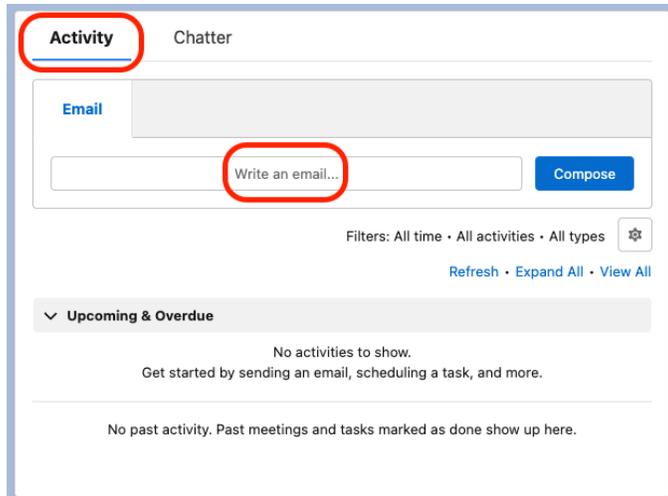
2. Add an email address in the **To** section. As you start typing, it may pop into the box for you. Select the desired email recipients.

3. Enter the **Subject** of the email.
4. Enter details in the text of the email, such as missing items on the application, clarifying questions on the information entered, or next steps after you have reviewed the application.
5. Click **Send**. The emails will stay with this Application record within the system.

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To	charles smith ✕		Cc
Bcc			
Subject	Recent Application was marked incomplete		

Font | Size | **B** *I* U A▾ | 🖼▾ | ≔ ⁝⁝ | ≡ ≡ ≡ | 🔗 | 💬

Thank you for your submitted application.

After review, I will need more information from you on the application around your criminal history and any adult children you may have.

After you have revised, please return for agency review.

Thank you,

A New Leaf, Inc.

Related To

IA-0000000203 ✕   **Send**

6. Click the **Home** tab to return to your list of applications.

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

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