

# Accessing Agency Account and Staff Personnel Information



**Knowledge Base Article**

## Accessing Agency Account and Staff Personnel Information

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## Accessing Agency Account and Staff Personnel Information

### Overview

This article describes how to access your Agency Account information, view, and add Personnel Information, and submit a background check within the Ohio Certification for Agencies and Families (OCAF) system.

### Getting Started

To gain access to the OCAF system, you must submit a completed JFS 7078 to [SACWIS\\_Access@jfs.ohio.gov](mailto:SACWIS_Access@jfs.ohio.gov). Enter the appropriate role on the form based on the type of agency you are employed by and the role(s) you serve within that agency:

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
EIDMX_JFS_S - OCAF Agency Board President	Private Agency
EIDMX_JFS_C - OCAF Agency Director	Public Agency
EIDMX_JFS_S - OCAF Agency Administrator	Private Agency
EIDMX_JFS_C - OCAF Agency Administrator	Public Agency
EIDMX_JFS_S - OCAF Agency Supervisor	Private Agency
EIDMX_JFS_C - OCAF Agency Supervisor	Public Agency
EIDMX_JFS_S - OCAF OHMAS	Private Agency
EIDMX_JFS_S - OCAF Home Study Assessor	Private Agency
EIDMX_JFS_C - OCAF Home Study Assessor	Public Agency
EIDMX_JFS_S - OCAF Branch/Facility Supervisor	Private 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.

A link to the 7078 Form can be accessed by clicking the link below:

[JFS 7078 Form](#)

**Commented [GS1]:** We would like the 7078 to be linked to the directions on completing the 7078 that are already in KBA.

**Commented [OL2]:** Can remove if you don't feel this is needed for this article. It was in the original so kept it but can delete.

**Commented [GS3R2]:** keep

**Formatted:** Font: (Default) Arial, 12 pt

### MyOhio Access

After the user is properly provisioned for access to OCAF, begin by accessing MyOhio using your SUID and your password. Navigate to the My Apps through My Workspace. Locate and click on the tile for JFS Salesforce Apps.

## Accessing Agency Account and Staff Personnel Information



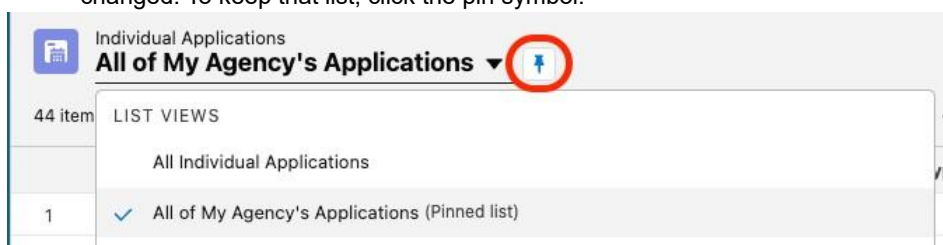
### Helpful Hints About the OCAF System

- If you have other Salesforce applications, please use the app launcher to navigate to OCAF.



Ohio Certification f...

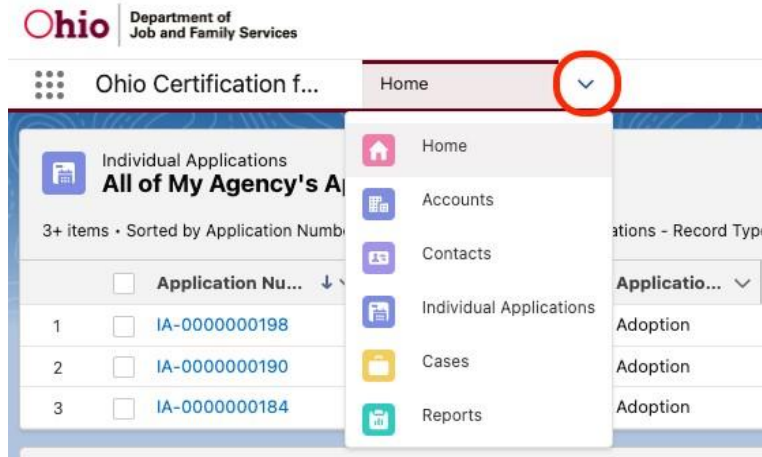
- You may use the web browser back arrow button to return to the previous screen or navigate between record tabs within Salesforce.
- All items in blue font contain a hyperlink to something else. Click on it to navigate to the corresponding information page.
- The **Home** dropdown menu contains a list 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.



## Accessing Agency Account and Staff Personnel Information

### Navigating OCAF

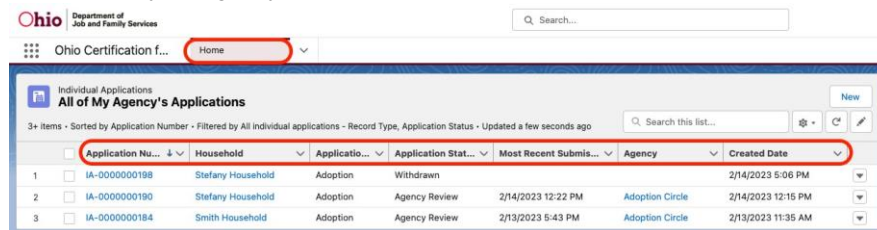
After logging into the system, the tabs at the top will guide you through the different work items in OCAF.



### Home Tab

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

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

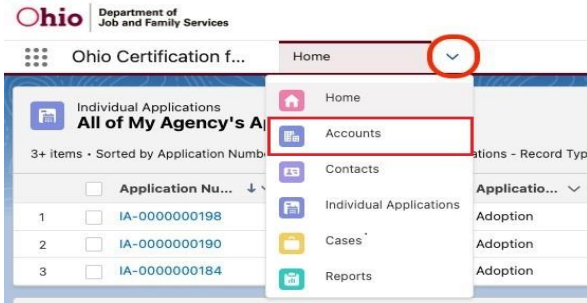


### Accounts Tab

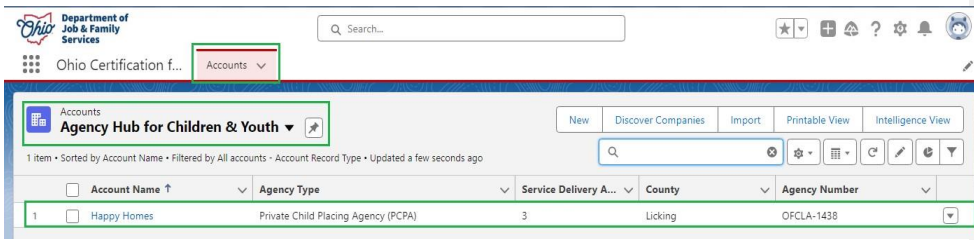
The **Accounts** tab will display your **Agency Account**. Here is where you can **View** and **Edit** your agency and **Add Contacts**.

1. From the **Home** dropdown menu, select **Accounts**.

## Accessing Agency Account and Staff Personnel Information

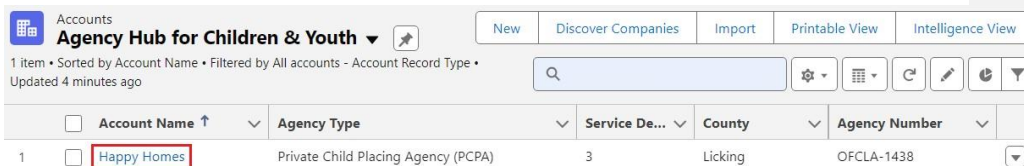


The **Accounts** screen appears displaying your **Account Name**, **Agency Type**, **Service Delivery Area**, **County** and **Agency Number**. See below:



## Viewing your Agency

1. To view your **Agency Information**, click the **Account Name** link.



Your **Account** screen appears, displaying all of your **Account Information**. The screen defaults to the **Details Tab**.


## Accessing Agency Account and Staff Personnel Information



Account  
**Happy Homes**


+ Follow New Event New Note Sharing


Agency Type	Certified	County	Agency Email
Private Child Placing Agency (PCPA)		Licking	testing@gmail.com


**Details** | Related


Agency Email  
testing@gmail.com 

Beginning of Continuous Certification   
1/1/2024 



Accreditation Agency  
Healthy Families America 


Accreditation Date  
1/1/2024 

4. Children's Crisis Care Facilities  
 

5. Residential Infant Care Center(s)  
 

**Activity** | Chatter

Filters: All time • All activities • All types 

Refresh • Expand All • View All

**Upcoming & Overdue**

No activities to show.  
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

**Note:** The  icon indicates those fields are **Editable**.

## Accessing Agency Account and Staff Personnel Information

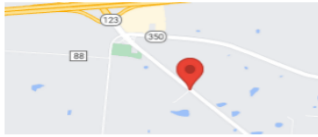
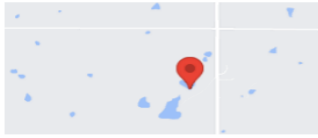
▼ Agency Information

Agency Number OFCLA-1438	Account Record Type Agency Hub for Children & Youth
Account Name Happy Homes	Account Owner <a href="#">Lisa Oliver</a>
Agency Acronym	Active in PCSA Exit Survey <input type="checkbox"/>
Agency Type Private Child Placing Agency (PCPA)	Accepts Adoption/Foster Apps & Inquiries <input type="checkbox"/>
Service Delivery Area (SDA) 3	Active in TEAM Ohio <input type="checkbox"/>
Fiscal Year	Restricted <span>?</span> <input type="checkbox"/>
Fiscal Starting Month	Is this an adoption agency? <span>?</span> <input type="checkbox"/>
Fiscal Ending Month	OCAF Licensing Region
Phone <span>?</span>	Exit Survey Region
Fax	Size of PCSA
Inquiry Primary Email <span>?</span>	Parent Account
Agency Description Test Narrative. Happy Homes provides residential care for children since 1/2024.	Inquiry Secondary Email <span>?</span>

▼ Additional Visit Dates

Additional Visit Start Date <span>?</span>	Additional Visit End Date
--	---------------------------

▼ Address

County Licking	Business Address 123 Happy St Test, Ohio 12345 United States 
	Mailing Address United States 



## Accessing Agency Account and Staff Personnel Information

Agency Certification	
Certified <sup>1</sup>	Beginning of Initial Certification Span
Certification Status <sup>1</sup>	End of Initial Certification Span <sup>1</sup>
Closure Type	Closure Date
QRTP Compliance	
QRTP Compliant	QRTP Compliance Effective Date
QRTP Comments <sup>1</sup>	QRTP Compliance End Date
Functions	
1. Children's Residential Center(s) <input type="checkbox"/>	8. Pre-adoptive Infant FH Certification <input type="checkbox"/>
2. Group Home(s) <input type="checkbox"/>	9. Custody of Children <input type="checkbox"/>
3. Residential Parenting Facilities <input type="checkbox"/>	10. Place Children <input type="checkbox"/>
3. Residential Parenting Facility (GH) <input type="checkbox"/>	11. Participate in Placement FH <input type="checkbox"/>
4. Independent Living Arrangements <input type="checkbox"/>	12. Participate in Placement Adopt <input type="checkbox"/>
5. Family FH Certification <input type="checkbox"/>	13. CCCF (CRC) <input type="checkbox"/>
6. Treatment Foster Home Certifications <input type="checkbox"/>	13. CCCF (GH) <input type="checkbox"/>
7. Medically Fragile Foster Homes Cert <input type="checkbox"/>	14. PNTWC <input type="checkbox"/>
System Information	
Created By <a href="#">Lisa Oliver</a> , 4/1/2024 1:06 PM	Last Modified By <a href="#">Lisa Oliver</a> , 4/1/2024 1:08 PM
SACWIS Information	
SACWIS Agency ID	Public Agency <input type="checkbox"/>
SACWIS Party ID	COA <input type="checkbox"/>
SACWIS Phone Ext	Inactive <input type="checkbox"/>
SACWIS Home Phone Ext	CWLA <input type="checkbox"/>

You can **Edit** any fields marked with **Edit Icon** on this page at any time.

## Accessing Agency Account and Staff Personnel Information

2. Click the **Related** Tab.

The screenshot shows the 'Happy Homes' account page. At the top, there are buttons for '+ Follow', 'New Event', 'New Note', and 'Sharing'. Below this, the agency information is displayed: Agency Type (Private Child Placing Agency (PCPA)), Certified, County (Licking), and Agency Email (testing@gmail.com). The 'Details' and 'Related' tabs are visible, with 'Related' being the active tab. The 'Activity' and 'Chatter' sections are also present on the right side.

The **Related** Tab screen appears displaying **Account History, Contacts, Cases, Individual Applications, Files and Living Units.**

The screenshot shows the 'Happy Homes' account page with the 'Related' tab selected. The page displays several sections:

- Details:** Agency Type (Private Child Placing Agency (PCPA)), Certified, County (Licking), Agency Email (testing@gmail.com).
- Related:** A message stating "We found no potential duplicates of this Account." and a note: "No duplicate rules are activated. Activate duplicate rules to identify potential duplicate records."
- Account History (2):** A table with the following data:

Date	Field	User	Original Value	New Value
4/1/2024 1:08 PM	County	Lisa Oliver		Licking
4/1/2024 1:06 PM	Created.	Lisa Oliver		
- Contacts (0):** A section with a 'New' button.
- Cases (Agency Name) (0):** A section with a 'New' button.
- Individual Applications (0):** A section with a 'New' button.
- Files (0):** A section with an 'Upload Files' button and a dashed box for dropping files.
- Living Units (0):** A section with a 'New' button.

## Accessing Agency Account and Staff Personnel Information

### Adding a New Contact

1. Within the **Contacts** section, click the **New** button.

The screenshot shows the 'Accounts' section of the Ohio Certification f... interface. The account name is 'Happy Homes'. Below the account name, there are buttons for '+ Follow', 'New Event', 'New Note', and 'Sharing'. The account details include Agency Type (Private Child Placing Agency (PCPA)), Certified status, County (Licking), and Agency Email (testing@gmail.com). The 'Details' tab is active, showing a 'Related' section with a warning: 'We found no potential duplicates of this Account.' Below this is an 'Account History (2)' table with columns for Date, Field, User, Original Value, and New Value. The table contains two entries: one for County (Lisa Oliver) and one for Created (Lisa Oliver). At the bottom of the 'Details' section, there is a 'Contacts (0)' section with a 'New' button highlighted by a red box.

A box appears requiring a **New Contact Record Type**.

2. Select **Personnel for Children & Youth** for the **Contact Type**.
3. Click the **Next** button.

The screenshot shows the 'New Contact' dialog box. It has a title bar 'New Contact' and a 'Select a record type' label. Below the label is a list of radio buttons for different contact types. The 'Personnel for Children & Youth' option is selected and highlighted with a red box. At the bottom of the dialog, there are 'Cancel' and 'Next' buttons, with the 'Next' button highlighted by a red box.

## Accessing Agency Account and Staff Personnel Information

A box appears requiring you to fill out the **Personnel Information** for the **New Contact**.

New Contact: Personnel for Children & Youth

\* = Required Information

**Personal Information**

<p><b>* Name</b></p> <p>Salutation --None--</p> <p>First Name First Name</p> <p>Middle Name Middle Name</p> <p><b>* Last Name</b> Last Name</p> <p><small>Complete this field.</small></p> <p>Suffix Suffix</p> <p><b>* Phone</b> Phone</p> <p><b>* Email</b> Email</p>	<p><b>Mailing Address</b></p> <p>Search Address</p> <p>Mailing Country United States</p> <p>Mailing Street</p> <p>Mailing City Mailing State/Province --None--</p> <p>Mailing Zip/Postal Code</p> <p><b>* County</b> --None--</p> <p><b>* Account Name</b> Happy Homes</p>
---	--

1. Provide the New Contacts **First** and **Last Name**.
2. Provide **Phone Number**.
3. Provide **Email**.
4. Fill out **Address**.
5. Make a selection from the **County** dropdown menu.
6. **Account Name** is auto filled with your Account Name.

### Demographic Information

<p><b>* Date of Birth</b></p> <p>Date of Birth</p>	<p><b>Race</b></p> <p>--None--</p>
<p><b>* Gender</b></p> <p>--None--</p>	<p><b>* Ethnic Background (Hispanic/Latino)</b></p> <p>--None--</p>

### Employment Information

<p><b>* Agency Job Title</b></p> <p>--None--</p>	<p><b>* Employment Type</b></p> <p>--None--</p>
<p>Job Description</p> <p>Job Description</p>	<p>Federation/OH ID</p> <p>Federation/OH ID</p>
<p><b>* Hire Date</b></p> <p>Hire Date</p>	<p>End of Employment Date</p> <p>End of Employment Date</p>
<p>Ohio SACWIS Employee ID</p> <p>Ohio SACWIS Employee ID</p>	<p>Ohio SACWIS Person ID</p> <p>Ohio SACWIS Person ID</p>

## Accessing Agency Account and Staff Personnel Information

7. Fill out the **Date of Birth** field.
8. Make a selection for **Gender** from the dropdown menu.
9. Make a selection for **Ethnic Background** (Hispanic/Latino).
10. Make a selection for **Agency Job Title**.
11. Make a selection for **Employment Type**.
12. Fill out the **Date of Hire** field.

Additional Background Search Dates

National Sex Offender Search Date

Findings of Recovery Search Date

Ohio Alleged Perpetrator Search Date

SAMS Search Date

Additional AP Search Required?

Contact Record Type  
Personnel for Children & Youth

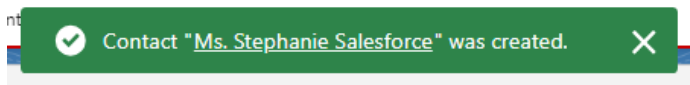
Contact Owner  
Lisa Oliver

Cancel Save & New Save

13. Click the **Save** button. **OR**
14. If adding more than one **New Contact**, you may click the **Save & New** button to create another contact within your Agency.

**Note:** All fields marked with an \* are required.

A **Validation Message** will appear verifying your **New Contact** has been created.



Within the **Related Tab** you will now see your **New Contact** listed.

**Note:** After save, the contact screen will open in a new tab right next to your related tab. It will be the new contact you just entered. See image below. You can click on the account name related tab to return to your previous screen.

## Accessing Agency Account and Staff Personnel Information

Choosing Hope ... Frank Sin... x

Contact  
**Mr. Frank Sinatra**

Agency Job Title	Phone	County
Supervisor	(456) 789-1230	Carroll

Details **Background Checks** Personnel History

Background Checks (0)

Click on the **Account Name** to return to the **Related Tab**.

Details **Related**

**We found no potential duplicates of this Account.**  
No duplicate rules are activated. Activate duplicate rules to identify potential duplicate records.

**Account History (2)**

Date	Field	User	Original Value	New Value
4/1/2024 1:08 PM	County	Lisa Oliver		Licking
4/1/2024 1:06 PM	Created.	Lisa Oliver		

View All

**Contacts (1)** New

Stephanie Salesforce	OFCL...	OFCL...	Cont... Personnel for Childr...
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View All

## Accessing Agency Account and Staff Personnel Information

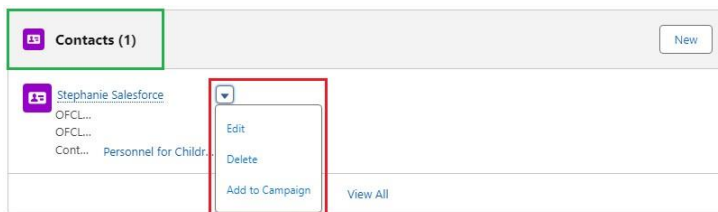
### Editing a Contact

Once your **New Contact** is created, you may **Edit** at any time.

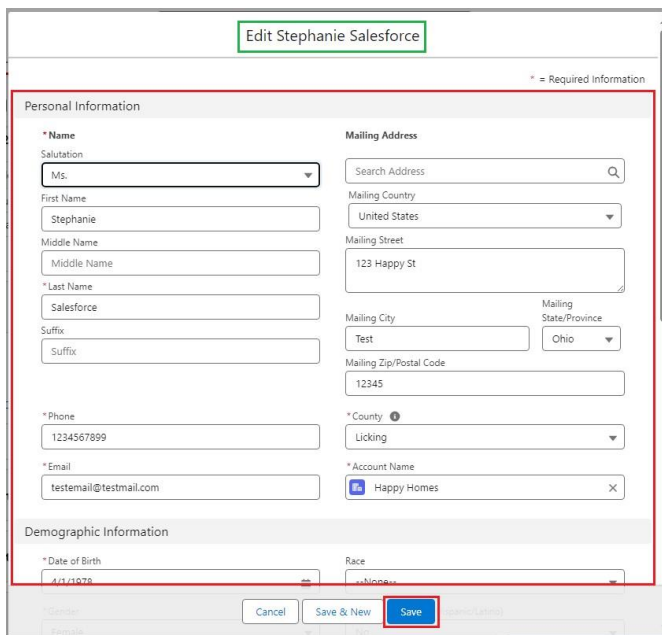
1. From the **Related Tab**, click the **dropdown** button next to the appropriate **Contact**.

**Note:** You can select **Edit**, **Delete** or **Add to Campaign**.

2. Select **Edit**.



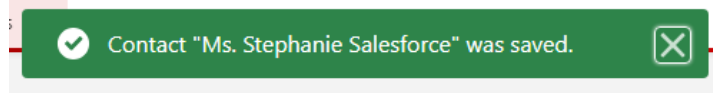
A box appears displaying the **Contacts Personnel Information**.

A screenshot of the 'Edit Stephanie Salesforce' form. The form is divided into several sections: 'Personal Information', 'Mailing Address', and 'Demographic Information'. The 'Personal Information' section includes fields for Salutation (Ms.), First Name (Stephanie), Middle Name, Last Name (Salesforce), and Suffix. The 'Mailing Address' section includes fields for Search Address, Mailing Country (United States), Mailing Street (123 Happy St), Mailing City (Test), Mailing State/Province (Ohio), and Mailing Zip/Postal Code (12345). The 'Demographic Information' section includes fields for Date of Birth (4/11/1978) and Race. At the bottom of the form, there are three buttons: 'Cancel', 'Save & New', and 'Save'. The 'Save' button is highlighted with a red box.

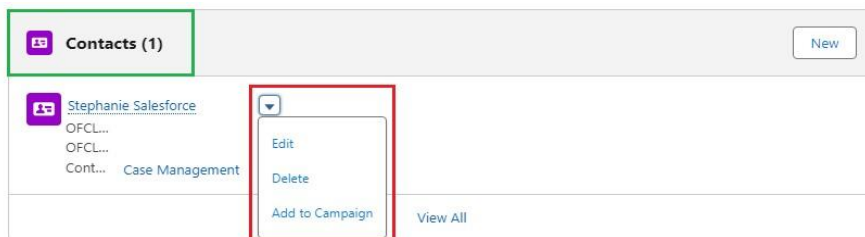
3. When done **Editing**, click the **Save** button.

## Accessing Agency Account and Staff Personnel Information

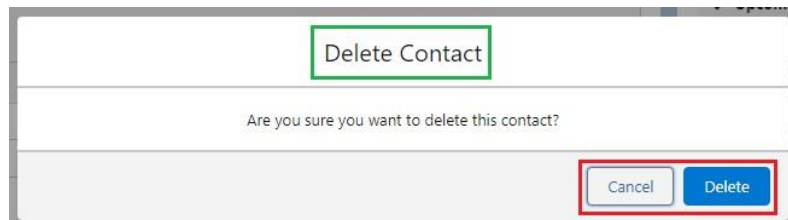
A **Validation Message** will appear verifying the contact was **Saved**.



4. If you need to **Delete** the **Contact**, select **Delete** from the **dropdown** menu.



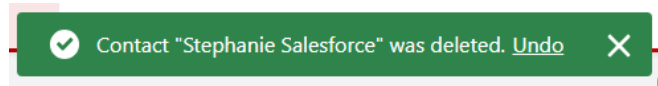
A box will appear verifying if you want to **Delete** the **Contact**.



5. Click **Delete** to permanently **Delete** the **Contact** from your Agency. **OR**

6. Click the **Cancel** button to exit out the Delete Contact Box.

A **Validation Message** will appear verifying the **Contact** was **Deleted**.



## Contacts Tab

The **Contacts Tab** will display the **Names**, **Contact Email**, **Account Name** and **Person ID** for **Personnel** listed within **Your Agency**. You have the option to add new contacts to your agency from this tab as well as from the Accounts tab. (Previously Reviewed)

1. From the **Home** dropdown menu, select **Contacts**.



## Accessing Agency Account and Staff Personnel Information

Ohio Department of Job and Family Services

Ohio Certification f... Home

- Home
- Accounts
- Contacts**
- Individual Applications
- Cases
- Reports

Individual Applications  
**All of My Agency's A**

3+ items • Sorted by Application Number

Application Nu...	Application Number
1	IA-0000000198
2	IA-0000000190
3	IA-0000000184

The **All Agency Personnel Contacts** screen appears.

Ohio Certification f... Contacts

Contacts  
**All Agency Personnel Contacts**

3 items • Sorted by Account Name • Filtered by All contacts - Contact Record Type • Updated a few seconds ago

happy homes

Account Name	Name	Agency Job Title	Hire Date	End of E...	Phone	Email
Happy Homes	Stephanie Salesforce	Agency Director	4/1/2024		1234567899	testemail@testmail.com
Happy Homes	Susie Sacwis	Administrator	3/4/2024		1234567890	testing@testemail.com
Happy Homes	Tim Testing	Staff Administrator	4/2/2019		1234567897	testingemail@email.com

- To **Edit any information on a contact**, click the dropdown arrow on the right hand side and select edit.
- You can click the dropdown button at the end of the grid to **Edit, Delete or Change Owner** for the **Contact**. Shown in red above.
- You can **Add a New Contact** directly from this page by clicking the **New** button.
- You can **View and edit the Contacts Personnel Information** by clicking the **Name** link.

Contacts  
**All Agency Personnel Contacts**

3 items • Sorted by Account Name • Filtered by All contacts - Contact Record Type • Updated 4 minutes ago

Account Name	Name	Agency Job Title	Hire Date	End of E...	Phone	Email
Happy Homes	Stephanie Salesforce	Agency Director	4/1/2024		1234567899	testemail@testmail.com
Happy Homes	Susie Sacwis	Administrator	3/4/2024		1234567890	testing@testemail.com
Happy Homes	Tim Testing	Staff Administrator	4/2/2019		1234567897	testingemail@email.com

## Accessing Agency Account and Staff Personnel Information

You will be taken to the **Background Checks** screen and can **add Background checks from here.**

**You can also then click on the Details tab to edit any information about the contact.**

The screenshot shows the contact details for Ms. Stephanie Salesforce. The top bar includes the contact name and a 'Change Record Type' button. Below this, there are fields for Agency Job Title (Agency Director), Phone ((123) 456-7899), and County (Licking). The main content area is divided into 'Details' and 'Activity' tabs. The 'Details' tab is active, showing 'Personal Information' with fields for Name, Mailing Address (123 Happy St, Test, Ohio 12345, United States), Phone, Email (testemail@testmail.com), County (Licking), and Account Name (Happy Homes). A map is displayed below the mailing address. The 'Activity' tab shows filters and a section for 'Upcoming & Overdue' activities, which currently has no activities to show.

## Background Checks Tab

The **Background Checks** tab allows you to submit a **Background Check** request for **New Contacts, New Employees in Your Agency.**

1. From the **Contacts** screen, click on the **Name** to access the **Background check** tab.

The screenshot shows a list of all agency personnel contacts. The table has columns for Account Name, Name, Agency Job Title, Hire Date, End of E..., Phone, and Email. The 'Name' column is highlighted with a red box, indicating that clicking on it leads to the background checks tab.

	Account Name	Name	Agency Job Title	Hire Date	End of E...	Phone	Email
1	Happy Homes	Stephanie Salesforce	Agency Director	4/1/2024		1234567899	testemail@testmail.com
2	Happy Homes	Susie Sacwis	Administrator	3/4/2024		1234567890	testing@testemail.com
3	Happy Homes	Tim Testing	Staff Administrator	4/2/2019		1234567897	testingemail@email.com

The **Screen** defaults to the **Background checks** Tab for that contact.

## Accessing Agency Account and Staff Personnel Information

The screenshot shows a user interface for Mr. Frank Sinatra. At the top, there are buttons for 'Create Background Check', 'Add', and 'View Contact Hierarchy'. Below this, there is a header with 'Details', 'Background Checks', and 'Personal History'. The 'Background Checks' tab is highlighted in yellow. Below the header, there is a section for 'Background Checks (0)'.

### Create a New Background Check

1. Click the **Create background Check button on the Background Checks screen.**

This screenshot is similar to the previous one, but the 'Create Background Check' button is highlighted with a red box. The 'Background Checks' tab is still selected.

A box appears requiring you to fill out information for the **Background Check**.

The screenshot shows the 'Create Background Check' form. At the top, there is a title 'Create Background Check' and a small icon. Below this is a large red-bordered box containing the text 'Background Check Details'. Underneath, there is a section for '\* Required' fields. The first field is 'Criminal Record Check Type: \*' with a dropdown menu showing 'Choose Values' and a red error message 'Complete this field.' below it. The second field is 'Date of Background Check: \*' with a date input field showing 'MM/DD/YYYY'. The third field is 'Receipt Date: \*' with a date input field showing 'MM/DD/YYYY'. Below these fields is a red-bordered box containing the text 'Files'. Underneath this box, there is a section for 'Attach Supporting Document(s): Allowed file types are - pdf, png, doc, docx, pages, csv, ppt, pps, pptx, xml, xlsx, xls, xlr.' followed by 'Attachments (Max file size for each file is 2 GB)'. There are two buttons: 'Upload Files' and 'Or drop files'. At the bottom of the form is a blue 'Submit' button.

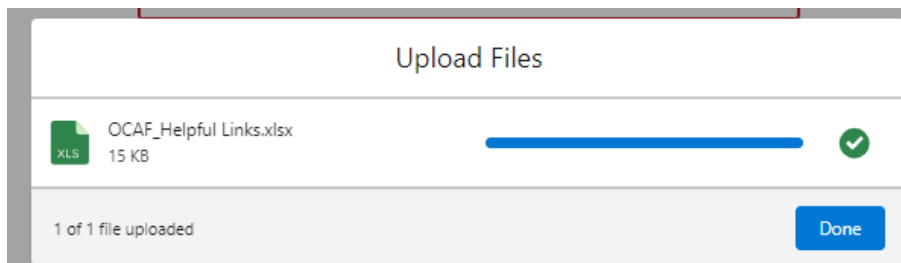
2. Make a selection for the **Criminal Record Check Type** dropdown box.

## Accessing Agency Account and Staff Personnel Information

3. Select the date the Background Check was completed in the **Date of Background Check**.

Type the date you received the **Background Check** into the **Receipt Date Box**

4. Click on the **Upload Files** button.
5. Find the correct **Background Check** on your computer that you wish to upload for this contact.
6. Click **Open** to start the upload.
7. Once upload is completed, select the **Done** button.



8. Scroll down to select the **Submit** button.

You will receive a message on your screen that the **Background Check** record was uploaded successfully. Click **Close**.

To enter another **Background Check**, follow same steps. To close that Contact, click the **X** next to the Contact Name in top tab bar.

If you need additional information or assistance, please contact the JFS DCY Customer Care Center at <https://odjfs2.my.site.com/CustomerCareCenter> .