Closing a Provider Without a Complete Home Study

Ohio SACWIS

Knowledge Base Article

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Closing a Provider Without a Complete Home Study

Overview

This Knowledge Base Article describes the steps to take if a **Provider** closes before their **Initial Home Study** has been completed. The **Closed** home study must be documented in Ohio SACWIS so that a **"Close" Recommendation** can be added and then approved by the State for foster care or by the Agency for adoption.

If a Closed home study is not final approved, the **Applicant Date Received will NOT populate** on the "Close" recommendation. To Close a Provider without completing the home study, complete the following steps.

Navigating to the Home Study Screen

1. From the Ohio SACWIS **Home** screen, click the **Provider** tab.

2. Click the **Workload** tab.

3. Under your name link, click the appropriate **Select** link.

The **Provider Overview** screen for the selected provider appears.

4. Click the **Home Study** link in the **Navigation** menu.

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The **Maintain Home Study History** screen appears.

5. If the home study has been started, click the **Edit** link in the appropriate row.

   OR

6. For a new home study, click the **Add Initial Home Study** button.

The **Home Study Details** screen appears.

7. Enter the required fields marked with a red asterisk.

Note: The **Home Study Type**, **Assessor**, **Provider Type**, and **Start Date** are required.

8. Click the **Save** button.

The **Maintain Home Study Information** screen appears displaying a grid of **Home Study Topics** links.

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Verifying the Verification Information

Important: Other than the **Verification** and **Recommendation**, no other information is required for the **Closed** recommendation to be processed for approval.

1. On the **Maintain Home Study Information** screen, click the **Verifications** link.

The **Maintain Verification Tasks** screen appears.

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2. Verify that a **Status** and **Date** are displayed for the **Application Received by Agency** task.

3. If the **Status** and **Date** are not displayed, click the **Edit** link next to the **Date Application Received by Agency** task.

The **Verification Details** screen appears.

4. In the **Status** drop-down list, select **Verified**.

5. Click the **Save** button.

The **Maintain Verification Tasks Information** screen appears displaying the information.

6. Click the **Close** button at the bottom of the screen.

The **Maintain Home Study Information** screen appears.

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Entering Recommendation Information

1. On the **Maintain Home Study Information** screen, click the **Recommendation** link.

The **Recommendation Details** screen appears.

2. In the **Recommendation** field (near the middle of the screen), select **Close** from the drop-down list.

3. In the **Primary Reason** field, select the appropriate reason from the drop-down list.

4. If applicable, click the appropriate checkbox(es) in the **Select All Secondary Reasons that Apply** field.

5. Click the **Save** button.

The **Maintain Home Study Information** screen appears showing the **Recommendation** as **Closed**.

Home Study Topics	
Topic	**Status**
Basic Provider Information (Name, Household Members, Address and Contact, Caregiver)	
Verifications	Not Completed
Safety Audit	Disposition Status Has Not Been Entered
References	No References Provided
Adult Children References	No / Not Applicable
Description of Home	Record Exists
Description of Family	Record Exists
Assessment Visits	No Visits Linked
Training Completed	Training Requirements Not Completed
Acceptance Criteria Information	Characteristics Information - Not Available / Usage Placement Criteria - Not Available
Recommendation	Close

Routing the Home Study for Approval

1. Route the home study for approval according to your agency's processes.

2. Request that your supervisor **Final Approve** the Closed home study.

3. When complete, navigate to the **Provider Overview** screen for the appropriate provider using the steps previously discussed.

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4. Click the **Approval/Certification** link in the **Navigation** menu.

The **Maintain Approval/Certification Recommendations** screen appears.

5. Click the **Add Recommendation** button.

The **Maintain Transactions** screen appears.

6. To create a request for closure, complete the required fields.

Important: Required fields display a red asterisk (*) next to them.

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7. In the **Closed Reason** field, select the appropriate choice from the drop-down list.

Note: If you select **Other** as the **Closed Reason**, enter comments in the **If Other, Explain** field.

Change Transaction Information			
Name Change	Level of Care Change	Marital Status Change	Relocation

Close Transaction Information
Closed Reason:
If Other, Explain:

8. Click the **Process Approval** button.

Transfer Transaction Information	
Receiving Agency:	
Receiving Agency Contact Person:	
Agency Worker Assignment	
Level of Care:	
Certifying Entity:	

Comments:

Spell Check Clear 2000

Process Approval

9. If the closure request is for **Foster Care**, route it to Rita Jackson.

Deactivating a Service and/or an Other Service

When the closure request is **Final Approved**, complete the following steps.

1. Navigate to the **Provider Overview** screen for the appropriate provider using the steps previously discussed.

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2. Click the **Service Credentials** link in the **Navigation** menu.

The **ODJFS Approved Services Filter Criteria** screen (**ODJFS Approved Services** tab) appears.

3. In the **ODJFS Approved Services** section, if any **Active** services appear, click the **Deactivate** link next to the appropriate service.

The **ODJFS Approved Services Activation/Deactivation Details** screen appears.

4. The **Effective Date** field automatically populates the current date as the deactivation date. If needed, enter the appropriate deactivation date.

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5. Click the **Save** button.

The **ODJFS Approved Services Filter Criteria** screen appears. The deactivated row no longer appears in the grid.

6. Repeat **Steps 3-5** as needed to **Deactivate** each **Active** service.

7. When all Active services have been deactivated, click the **Other Services** tab.

The **Other Services Filter Criteria** screen (**Other Services** tab) appears.

8. If any **Active** services appear, click the **Deactivate** link next to the appropriate service.

The **Other Services Activation/Deactivation Details** screen appears.

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9. The **Effective Date** field automatically populates the current date as the deactivation date. If needed, enter the appropriate deactivation date.

10. Click the **Save** button.

The **Other Services Filter Criteria** screen appears. The deactivated row no longer appears in the grid.

11. Repeat **Steps 8-10** to **Deactivate** each **Active** Other Service.

Adding Status Information

1. Navigate to the appropriate **Provider Overview** screen using the steps previously discussed.

2. Click the **Provider Information** link.

The **Provider Name Information** screen (**Basic** tab) appears displaying the **Provider Status Information** section.

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3. In the **Provider Status** field, select **Closed** from the drop-down list.

4. Click the **Add Status** button.

The **Provider Status Information** screen appears.

5. In the **Effective Date** field, enter the appropriate date.

6. Click the **OK** button.

The **Provider Name Information** screen (**Basic** tab) appears.

7. Click the **Save** button at the bottom of the screen.

The **Provider Overview** screen appears.

8. Have your supervisor end-date all assignments to this Provider record according to your agency's processes.

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

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