

# **Completing a Home Study Amendment**



**Knowledge Base Article**

Completing a Home Study Amendment

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## Completing a Home Study Amendment

### Overview

This article describes how to complete a home study amendment in Ohio SACWIS and some of the important elements to remember to process them successfully.

A **Home Study Amendment** is the home study record created to reflect new information after an initial or recertification home study record was approved. It ensures that the home study reflects the most current information and any changes taking place with the provider.

### Policy and Procedure Background

Please refer to the following information for the rules pertaining to home study amendments:

[Ohio Administrative Code - 5101:2-5-30](#)

These are some important points to highlight from these licensing rules -

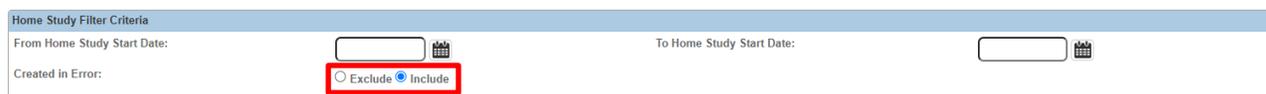
(B) If the agency is notified of any of the following changes for the foster caregiver, the agency shall amend the home study:

- (1) A change in the marital status of the foster caregiver(s).
- (2) The death of a foster caregiver or household member.
- (3) A change in household members, not including foster children.
- (4) A change of address for the foster family that is different than the address listed on the foster home certificate.

(C) (1) The amendment shall be completed within thirty days of the date of the change, or within thirty days of the date the agency became aware a change occurred if notification did not occur pursuant to rule [5101:2-7-14](#) of the Administrative Code.

### Completing an Amendment in Ohio SACWIS

1. Proceed to the Home Study left-hand navigation link on the Provider record and select the **copy** link on the most recent Home Study, which should contain the most recent information.
2. If you cannot see a Home Study with a **copy** link, click the **Include** radio button for **Created In Error**. This is located at the top of the screen under **Home Study Filter Criteria** and defaults to **Exclude**. If the most recent Home Study was marked Created in Error, the **copy** link will be located on this 'hidden' Home Study.



Home Study Filter Criteria

From Home Study Start Date:  

To Home Study Start Date:  

Created in Error:  Exclude  Include

3. In the Home Study Details initial screen:
  - It is imperative that the **Start Date** of your Amendment be the date of or prior to the date of the change you are making. For instance, if the family moved

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to a new address that was effective on 1/15/2024, the amendment must have a **Start Date** of 1/15/2024 or earlier. Otherwise, the system will not recognize the change taking place in the Provider Information. The same applies to if a new member enters the home. Your amendment **Start Date** must be equal to or prior to the effective date of the new household member. You are able to backdate, if needed.

- You will select the **Home Study Type** of **Amend**.

**Home Study Details**

Agency: County Children Services Board

Home Study Type: \* Amend

Provider Type: \* Foster Care

Start Date: \* 01/15/2024

Save Cancel

- Under the **Amend/Update** screen under **Home Study Topics**, you will check the box or boxes that apply to your Amendment reason(s) and add any Comments necessary.

**Amendment/Update Information**

Select All that Apply: \*

Name Change  Relocation  Renovation

Marital Status  Level of Care  New Applicant

Change in Applicant  Change in Occupancy  Adoption of Foster Child (12 Months or more)

CPC Update  Service Limits  Safety Audit Update

Annual Review  Other

Comments:

Spell Check Clear 1000

Apply Save Cancel

- Proceed through the Home Study Topics to document the necessary changes per rule and route for approval.

**Note:** Ohio SACWIS won't necessarily validate all the information that is required by rule, such as documentation of the activity log entered when the family notified you of their relocation or updated BCI/FBI verifications for new household members.

While not a comprehensive list of all amendment reasons and tasks, two of the more common amendment workflows are detailed below:

### Change in Occupancy

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1. As noted above, when beginning the Change in Occupancy amendment, make sure to date it for the day the person entered the home OR a date prior to them entering the home. That will trigger Ohio SACWIS to recognize the new individual entering the home based on their member effective date.
2. Once the amendment is open, add the individual into the **Members** list (completing a person search and if they do not exist in the system, creating a new person record) and add relationships, roles, etc.
3. In the **Verifications** section, put in new dates as applicable for things completed for the new individual – such as criminal record checks/FBI checks/medical statements/AP Search, etc. In the verification narrative, copy the original date when completed for the applicants, making note the new date pertains to the new household member.
4. In the **Description of Home** record, copy the most recent record and then indicate in which bedroom/bed the new member is present.
5. In the **Description of Family** record, copy the recent record and discuss the new individual. For an amendment on an Initial DOF record, new narrative questions for a child or adult household member will appear and users can keep all other information in the record the same. For a Review DOF, new narrative boxes will appear in Member Narratives to answer (even though there will be minimal information since they just entered the household) and then in the Family Narratives, answer the question regarding changes in household occupancy. For many of the other questions, you can mark N/A or leave the previous answers. For the Review Effective and Review End Dates, mark it effective a day after the last DOF record end date to an end date of the current date so that it captures the new individual in the home.
6. Link the activity logs documenting the face-to-face meetings with the new household member in the **Assessment Visits**.
7. Create new **Acceptance Criteria Information** if there are capacity changes based on the new person in the home, otherwise it can remain as is.
8. Submit amendment for approval to supervisor, and unless another amendment reason was checked, there should be no approval/certification record created which needs to be sent to the State.

**Note:** For adopted foster children, please wait for the child to be added automatically to the members list, which occurs after the PCSA seals and secures the adoptive child's record. If you must add them because of time frames or a recertification coming due, please create a new Person ID, NEVER use their biological Person ID. You must contact the Help Desk to request a merge once the post-adoptive ID is added to the Members List, because you will then have duplicates of the same person on your member list.

### Relocation

1. As noted above, the amendment **Start Date** must be the date of their move/address effective date or prior, otherwise, the address change will not be reflected.
2. Make sure to enter a new **Description of Home** record to provide details on the new residence and bed space.
3. Complete a new **Safety Audit** record and update all Verification tasks as applicable.
4. Update capacity as needed in the **Acceptance Criteria Information**.

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5. Upon supervisory approval, an **Approval/Certification** record is created and must be routed to the State so the new foster home certificate reflects the new residence.

**Note:** The fire inspection is due 90 days from the move and can be future dated or a note indicating when it will be completed is fine when completing the new Safety Audit and Verifications tasks.

### Change in Circumstances

The amendment reasons/boxes checked in the home study amendment record that constitute Change in Circumstances will result in an approval/certification record that must be routed to the State for approval after completion of your home study amendment.

1. Name Change (even if you just add a middle name - if this box is checked, an approval certification record is created)
2. Relocation
3. Marital Status
4. Change in Applicant/New Applicant (adding or removing an Applicant from the license)
5. Level of Care Change

A new Approval/Certification is generated on these, so you must check that area to see if it needs to be forwarded, because a new Foster Care License is needed – the amendments above will change the face of the license.

**Important:** You will not be able to proceed with another home study later if you do not forward this record for approval.

### Changes Outside of Amendments

Acceptance Criteria can be completed at any time, and an entire amendment is not needed unless changing the number of youth the home is approved for. This new record will be linked to the next home study record.

The Description of Family and Description of Home records can also be done outside of a home study to document changes that do not require an amendment (such as addition of a new pet in the home or updating car insurance).

### Additional Tips

If you don't have a span on the front page of the provider record, you do not have a licensed/approved provider.

Activity Logs are great ways to document your contact with a resource family and to verify/validate changes made in amendments.

## Completing a Home Study Amendment

Check with your Licensing Specialist if you have any questions as to what documentation is needed for an amendment.

If you need additional information or assistance, please contact the Automated Systems Help Desk at [SACWIS\\_HELP\\_DESK@childrenandyouth.ohio.gov](mailto:SACWIS_HELP_DESK@childrenandyouth.ohio.gov) .