

# **Agency Certification Inquiry Supervisor & Licensing Specialist**



**Knowledge Base Article**

# Agency Certification Inquiry Supervisor & Licensing Specialist

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# Agency Certification Inquiry Supervisor & Licensing Specialist

## Overview

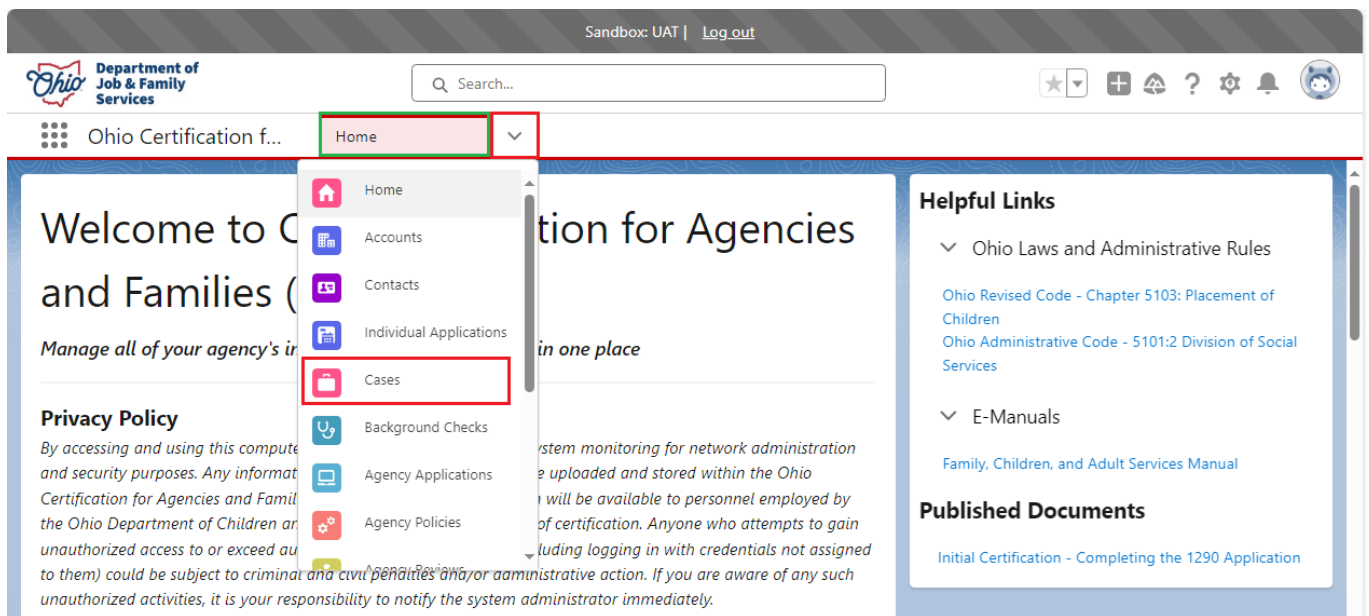
This User Guide reviews the process of a Supervisor assigning an Agency Certification Inquiry to a Licensing Specialist, reviewing the inquiry as a Licensing Specialist, and approving and/or rejecting the inquiry within the Ohio Certification for Agencies and Families (OCAF) system.

## Navigating to Agency Inquiries - Supervisors

Once an Agency Certification Inquiry has been submitted, a Licensing Supervisor will assign a Licensing Specialist to the inquiry for review.

From the **Licensing Supervisors OCAF Home** screen:

1. Select **Cases** from the dropdown.



2. Select **OCAF Licensing Supervisor Queue** from the dropdown menu.

**Note:** The Licensing Supervisor may select All New Agency Inquiries and see all the **Submitted** and **Assigned** Inquiries. The **OCAF Licensing Supervisor Queue** will only display the inquiries that need to be assigned to a Licensing Specialist.

# Agency Certification Inquiry Supervisor & Licensing Specialist

The screenshot shows a dropdown menu for 'Cases' with 'OCAF Licensing Supervisor Queue' selected. The menu is divided into 'RECENT LIST VIEWS' and 'ALL OTHER LISTS'. The 'OCAF Licensing Supervisor Queue' is highlighted with a red box. The 'RECENT LIST VIEWS' section includes: 1. All My Agency's Inquiries, 2. All New Agency Inquiries (Pinned list), 3. My Open Agency Inquiries, and 4. OCAF Licensing Supervisor Queue (checked). The 'ALL OTHER LISTS' section includes: All APS Policy Cases, All Close Cases, All Open Cases (do not filter this list), CS Training & Development, and Data Analytics queue.

## Assigning a Licensing Specialist

3. Locate the appropriate **inquiry** that needs **Assigned**.
4. **Checkmark** the appropriate inquiry.
5. Click the **Blue Arrow** dropdown button.
6. Select **Assign Inquiry Owner**.

The screenshot shows a table of cases with the following columns: Case N..., Contact Name, Subject, Status, Priority, Date/Time Opened, and Case Owner Alias. The first four rows are highlighted in grey. The fourth row is selected, and a dropdown menu is open over the 'Case Owner Alias' column, showing 'Change Case Owner' and 'Assign Inquiry Owner' (highlighted with a red box). The 'Assign Inquiry Owner' button is also highlighted with a red box.

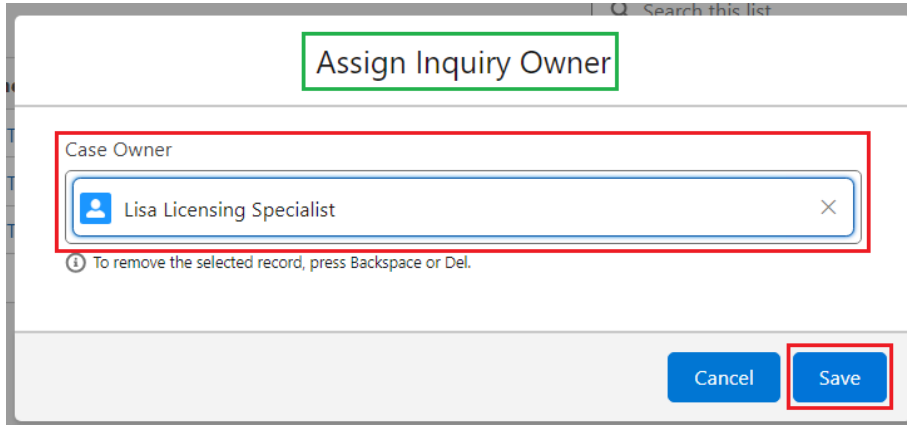
Case N...	Contact Name	Subject	Status	Priority	Date/Time Opened	Case Owner Alias
01186993	Admin OCAF Test Agency 23		Submitted	Medium	10/28/2024 9:37 AM	OCAF Licensing Supervisor Queue
01186994	Admin OCAF Test Agency 24		Submitted	Medium	10/28/2024 9:37 AM	OCAF Licensing Supervisor Queue
01186995	Admin OCAF Test Agency 25		Submitted	Medium	10/28/2024 9:37 AM	OCAF Licensing Supervisor Queue
01187125	James Smith		Submitted	Medium	11/13/2024 9:46 AM	OCAF Licensing Supervisor Queue

An **Assign Inquiry Owner** box appears.

7. Select the **Licensing Specialist** for your Agency.

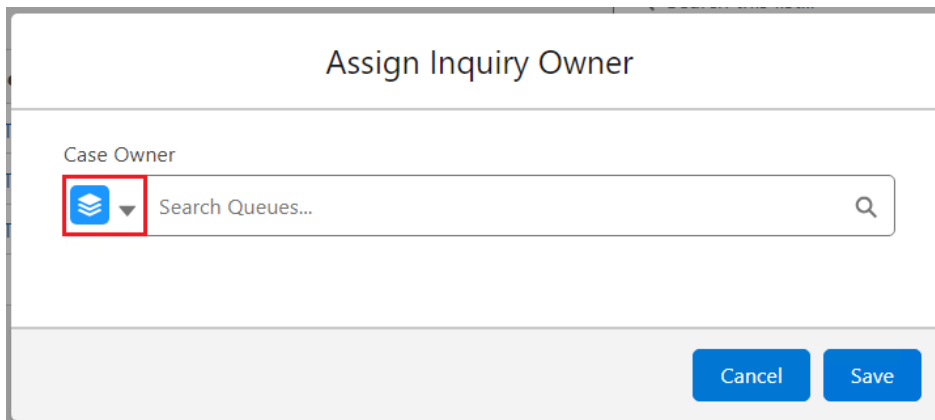
## Agency Certification Inquiry Supervisor & Licensing Specialist

8. Click **Save**.

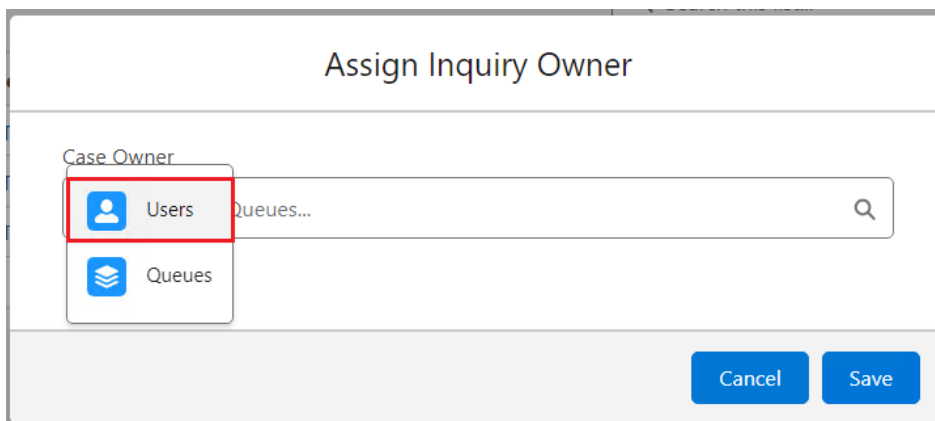


The screenshot shows a dialog box titled "Assign Inquiry Owner". At the top, there is a search bar with the text "Search this list". Below it, the "Case Owner" field is highlighted with a red box and contains "Lisa Licensing Specialist" with a user icon and a close button (X). Below the field, there is a small icon and the text "To remove the selected record, press Backspace or Del." At the bottom right, there are two buttons: "Cancel" and "Save", with the "Save" button highlighted by a red box.

**Note:** The user may need to change from Search Queues to Search Users by clicking the grey arrow in order to search for the Licensing Specialist. See below:



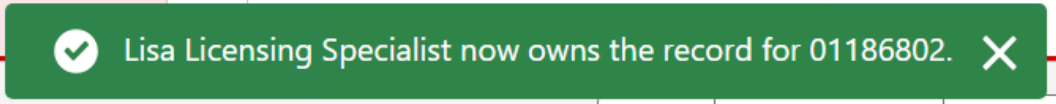
The screenshot shows the "Assign Inquiry Owner" dialog box. The "Case Owner" field has a dropdown menu icon (a grey arrow) highlighted with a red box. The dropdown menu is currently set to "Search Queues...". At the bottom right, there are "Cancel" and "Save" buttons.



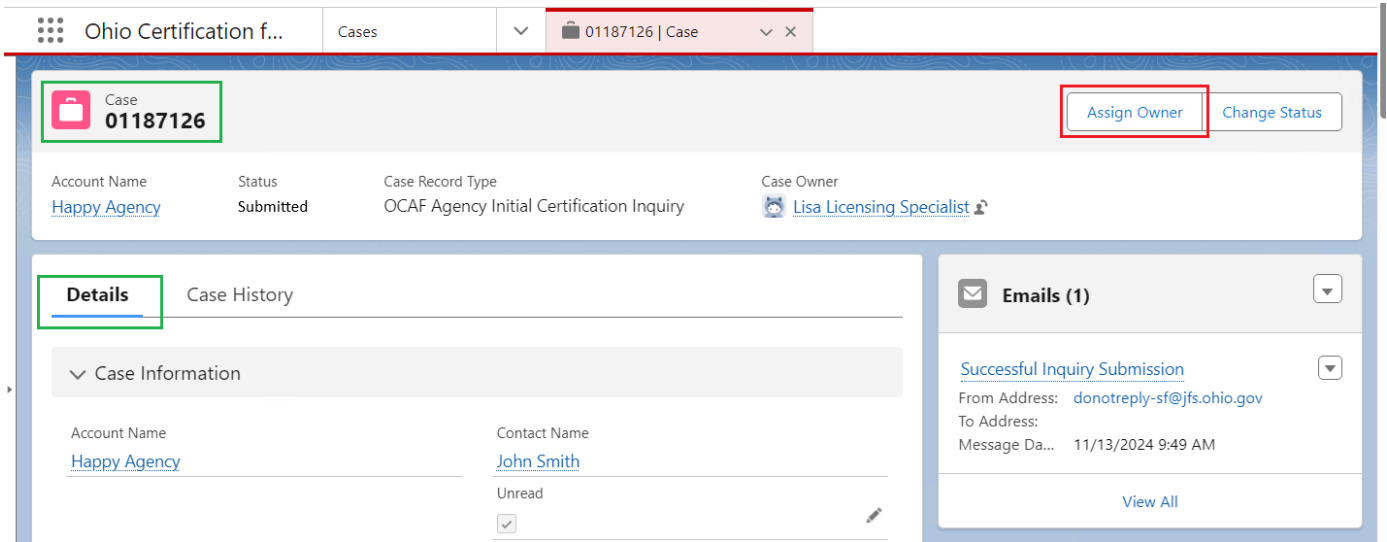
The screenshot shows the "Assign Inquiry Owner" dialog box. The "Case Owner" field has a dropdown menu icon (a grey arrow) highlighted with a red box. The dropdown menu is currently set to "Users". Below the dropdown menu, there is a "Queues" option. At the bottom right, there are "Cancel" and "Save" buttons.

Once a Licensing Specialist has been Saved, a message will display verifying the Owner Change.

# Agency Certification Inquiry Supervisor & Licensing Specialist



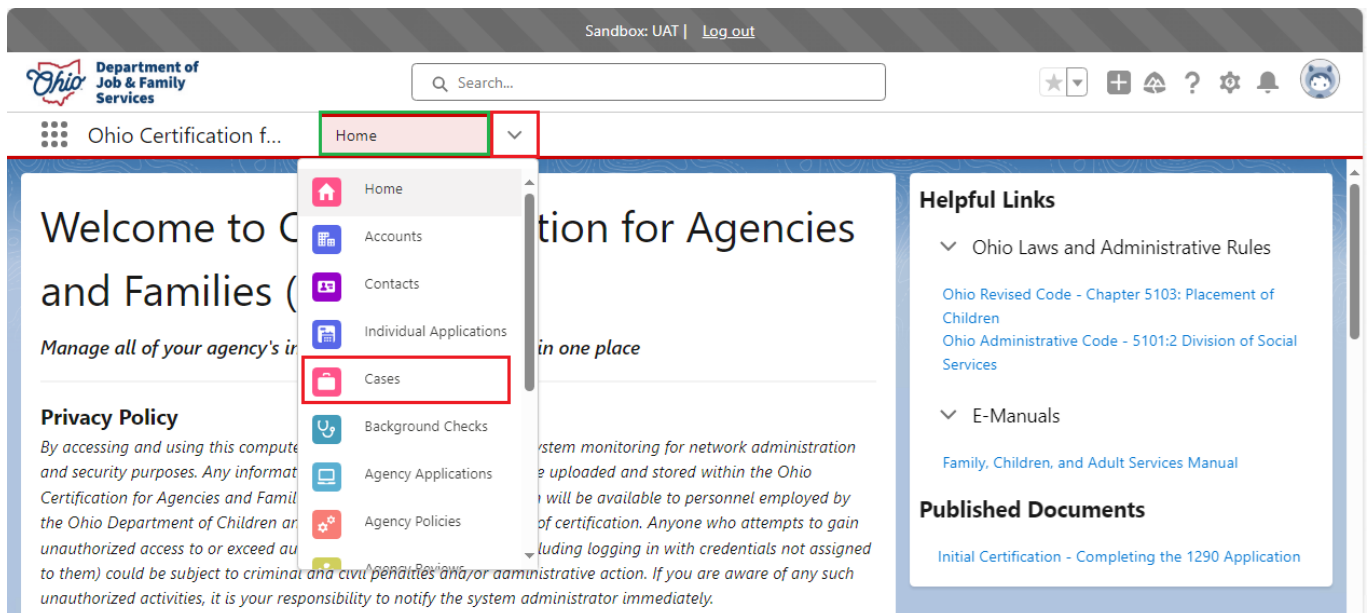
**Note:** The Supervisor can also **Assign Inquiry Owner** from the **Case Details** screen. See below:



## Navigating to Open Agency Inquiries - Licensing Specialist

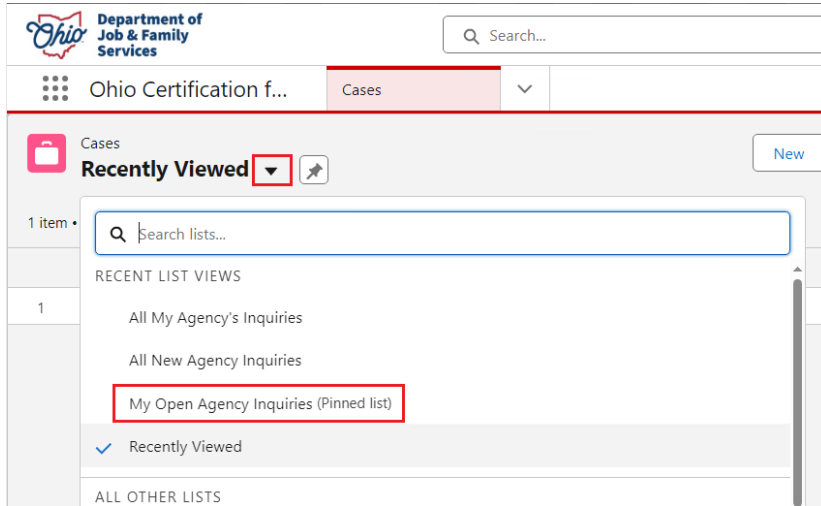
From the **Licensing Specialist OCAF Home** screen:

1. Select **Cases** from the dropdown.

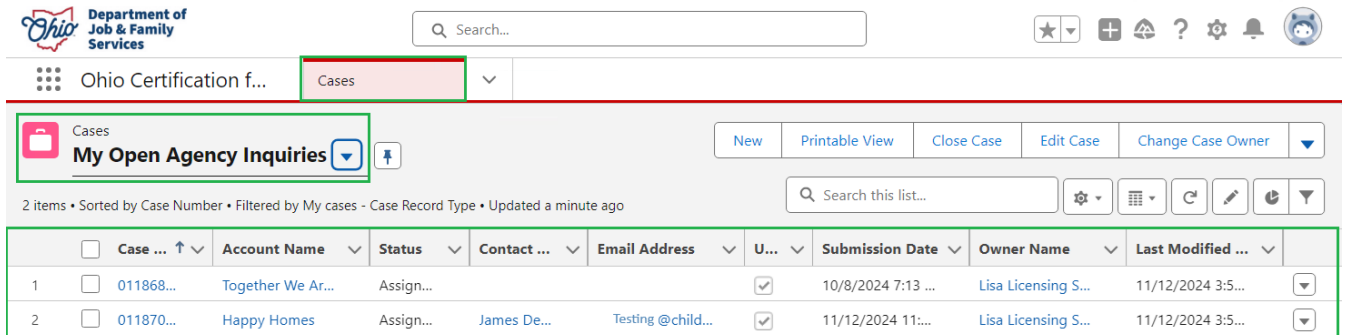


# Agency Certification Inquiry Supervisor & Licensing Specialist

2. Select **My Open Inquiries** from the dropdown menu.



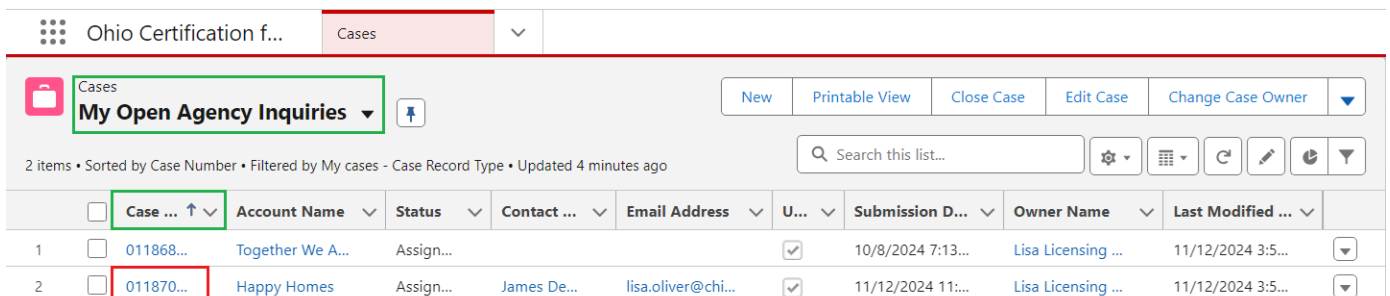
The **My Open Agency Inquiries** screen appears. The Inquires listed here are assigned to you.



## Licensing Specialist Inquiry Review

From the **My Open Agency Inquiries** screen:

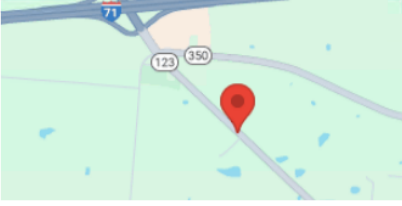
1. Click the appropriate **Case Number**.



# Agency Certification Inquiry Supervisor & Licensing Specialist

The **Case Details** screen appears defaulting to the **Details** tab.

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

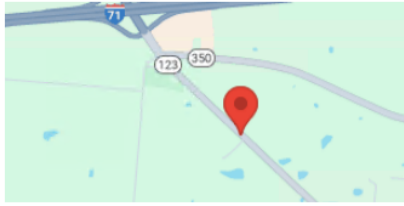
Agency Name	County
Happy Homes	Athens
Agency Address	
123 Happy St	
Happy, Ohio 12345	
United States	
	
<b>Agency Administrator Information</b>	
Administrator Preferred Prefix	Phone Number
	(123) 456-1122
First Name	Email Address
James	
Last Name	
Dean	



# Agency Certification Inquiry Supervisor & Licensing Specialist

Administrator Address

123 Happy St  
Happy, Ohio 12345  
United States



Involved in another certified agency ? ⓘ

List of all agencies Admin involved with

## ▼ Agency Contact Information

Agency Job Title

Phone Number

First Name

Email Address

Last Name

## ▼ Agency Details

Proposed purpose of the agency

I would like to place children for Foster Care or Adoption;I would like to participate in Placement in Foster Care;I would like to participate in Placement in Adoption

Proposed custody arrangement

I would like my agency to be licensed to take custody of children

Anticipated sources of child referral ⓘ

My agency will contract with county children services agencies who need to place children in care;My agency will work directly with private families and parents who need to place their children in care or for adoption;Other (Explain)

Explanation for selecting Other

Test

## ▼ Additional Information

Submission Date

11/12/2024 11:51 AM

Inquiry Rejected By

Most Recent Submission Date

11/12/2024 11:51 AM

Inquiry Rejected Date

Inquiry Accepted Date

Reason for Reject

Inquiry Accepted By

## ▼ System Information

# Agency Certification Inquiry Supervisor & Licensing Specialist

Created By  
[OCAF Agency Certification Portal Site Guest](#)  
[User](#)  
 , 11/7/2024 12:41 PM

Last Modified By  
[Lisa Licensing Supervisor](#), 11/12/2024 3:54  
 PM

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

2. To view case history, click the **Case History** tab.

Case **01187053**

[Assign Owner](#) [Change Status](#)

---

Account Name: [Happy Homes](#)

Status: Assigned

Case Record Type: OCAF Agency Initial Certification Inquiry

Case Owner: [Lisa Licensing Specialist](#)

---

**Details** | Case History

---

Case Information

Account Name: [Happy Homes](#)

Contact Name: [James Dean](#)

Unread:

**Emails (1)**

---

[Successful Inquiry Submission](#)

From Address: donotreply-sf@jfs.ohio.gov

To Address:

Message D... 11/7/2024 12:41 PM

[View All](#)

The **Case History** screen appears.

Case **01187053**

[Assign Owner](#) [Change Status](#)

---

Account Name: [Happy Homes](#)

Status: Assigned

Case Record Type: OCAF Agency Initial Certification Inquiry

Case Owner: [Lisa Licensing Specialist](#)

---

**Details** | Case History

---

**Case History (6+)**

Date	Field	User	Original Value	New Value
11/12/2024 3:54 PM	Case Owner	<a href="#">Lisa Licensing Sup...</a>	Lisa Licensing Sup...	Lisa Licensing Spec...
11/12/2024 3:54 PM	Case Owner	<a href="#">Lisa Licensing Sup...</a>	Lisa Licensing Spec...	Lisa Licensing Sup...
11/12/2024 3:52 PM	Case Owner	<a href="#">Lisa Licensing Sup...</a>	Lisa Licensing Sup...	Lisa Licensing Spec...
11/12/2024 3:02 PM	Case Owner	<a href="#">Lisa Licensing Sup...</a>	Lisa Licensing Spec...	Lisa Licensing Sup...
11/12/2024 2:29 PM	Case Owner	<a href="#">Lisa Licensing Sup...</a>	OCAF Licensing Su...	Lisa Licensing Spec...
11/12/2024 2:29 PM	Status	<a href="#">Lisa Licensing Sup...</a>	Submitted	Assigned

[View All](#)

**Emails (1)**

---

[Successful Inquiry Submission](#)

From Address: donotreply-sf@jfs.ohio.gov

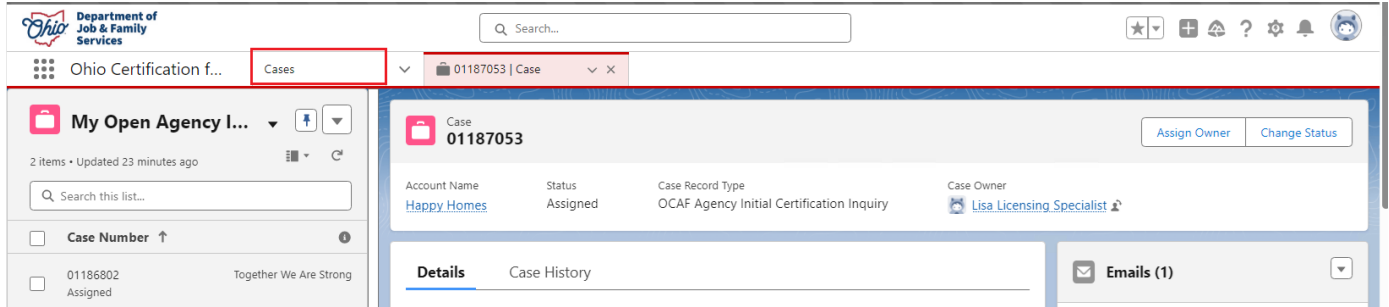
To Address:

Message Da... 11/7/2024 12:41 PM

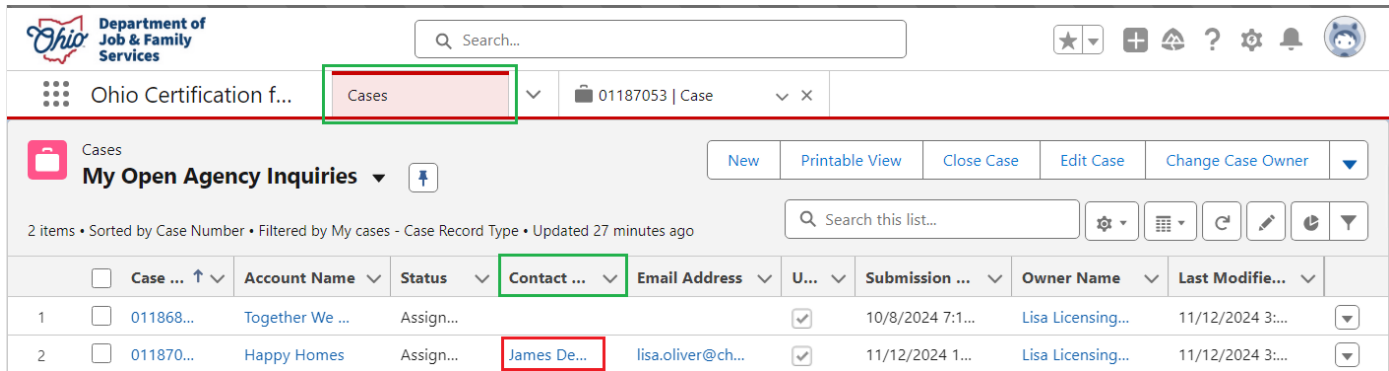
[View All](#)

## Agency Certification Inquiry Supervisor & Licensing Specialist

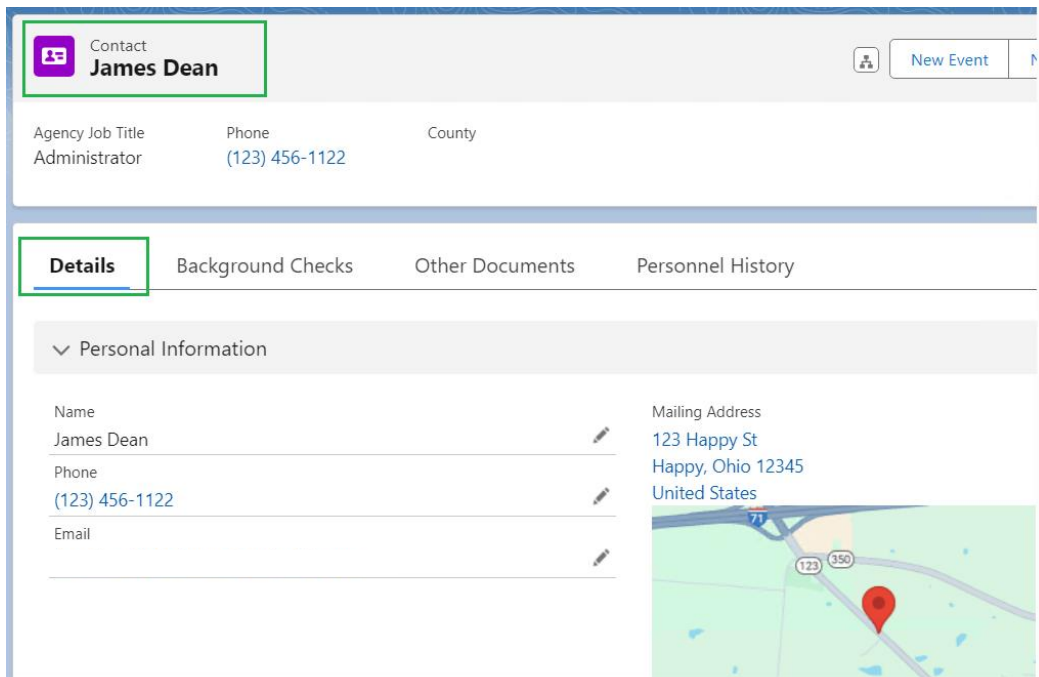
When done reviewing the **Case Details** and **Case History** tabs, click the **Case** tab at the top of the page. You will be navigated back to the **My Open Agency Inquiries** screen.



3. Click on the **Contact Name** for the appropriate inquiry.



The **Contact Details** screen displays, defaulting to the **Details** tab.



# Agency Certification Inquiry Supervisor & Licensing Specialist

4. Click the **Background Checks** tab.

Contact  
**James Dean**

Agency Job Title: Administrator  
Phone: (123) 456-1122  
County:

Details | **Background Checks** | Other Documents | Personnel History

Personal Information

The **Background Checks** screen appears.

Contact  
**James Dean**

Agency Job Title: Administrator  
Phone: (123) 456-1122  
County:

Details | **Background Checks** | Other Documents | Personnel History

**Background Checks (2)**

2 items • Sorted by Created Date • Updated a few seconds ago

Background Check Number	Criminal Record Check Type	Date of Background Check	Status
1 <a href="#">BGC-0127</a>	BCI Only	11/1/2024	Pending
2 <a href="#">BGC-0128</a>	FBI Only	11/1/2024	Pending

[View All](#)

5. To view the Background Checks, click the blue hyperlink under **Background Check Number**.

# Agency Certification Inquiry Supervisor & Licensing Specialist

Contact **James Dean**

Agency Job Title: Administrator | Phone: (123) 456-1122 | County:

Details | **Background Checks** | Other Documents | Personnel History

**Background Checks (2)**

2 items • Sorted by Created Date • Updated a few seconds ago

Background Check Number	Criminal Record Check Type	Date of Background Check	Status
1 <b>BGC-0127</b>	BCI Only	11/1/2024	Pending
2 <b>BGC-0128</b>	FBI Only	11/1/2024	Pending

[View All](#)

The **Background Check Details** screen appears. This tab displays the information entered by the agency, such as: **Criminal Record Check Type**, **Date of Background Check**, **Receipt** and **Personnel Name**. All these fields with the **Edit Icon** next to them are **Editable**.

Ohio Certification f... | Cases | 01187053 | Case | James Dean | Contact

James Dean | Co... | **BGC-012...**

**Background Check BGC-0127** | Edit | Printable View

**Details** | Background Check History

**Background Check Details**

Criminal Record Check Type	BCI Only	Status	Pending
Date of Background Check	11/1/2024	Non-Compliant Reason	
Receipt Date	11/1/2024	Comments	
Review Date		Routed for Review Reason	
Background Check Number	BGC-0127	Study Number	

**Files (1)**

- BCI Background Check  
Nov 12, 2024 • 13KB • docx

[View All](#)

Here is where the **Licensing Specialist** and/or **Supervisor** will review the **Received Background Check**. See Below:

# Agency Certification Inquiry Supervisor & Licensing Specialist

Ohio Certification f... Cases 01187053 | Case James Dean | Contact

James Dean | Co... BGC-012...

Background Check **BGC-0127** Edit Printable View

**Details** Background Check History

Background Check Details

Criminal Record Check Type	BCI Only	Status	Pending
Date of Background Check	11/1/2024	Non-Compliant Reason	
Receipt Date		Comments	

Files cannot be added to an existing Background Check

**Files (1)**

BCI Background Check  
Nov 12, 2024 • 13KB • docx

View All

6. Once done reviewing, click the **Edit** button.

Ohio Certification f... Cases 01187053 | Case James Dean | Contact

James Dean | Co... BGC-012...

Background Check **BGC-0127** Edit Printable View

**Details** Background Check History

Background Check Details

Criminal Record Check Type		Status	
----------------------------	--	--------	--

Files cannot be added to an existing Background Check

**Files (1)**

An Edit box appears allowing the user to **Edit** the status of the Background Check.

7. Make a selection from the **Status** dropdown menu.
8. Select a **Review Date**.
9. Click **Save**.

## Agency Certification Inquiry Supervisor & Licensing Specialist

Edit BGC-0127

\* = Required Information

Background Check Details

\*Criminal Record Check Type

Date of Background Check  
11/1/2024

Receipt Date  
11/1/2024

Review Date ↻

Background Check Number  
BGC-0127

\* Status ↻

Non-Compliant Reason

Comments

Routed for Review Reason

Study Number

Cancel

Save

**Note:** If the Background Check is **Non-Compliant** or needs corrected, please refer to this User Guide for further instruction: [Licensing Specialist Access to Background Checks OCAF](#) .

A message will display verifying the Background Check has been saved.



The **Status** now shows as Compliant on the **Background Check** screen.

## Agency Certification Inquiry Supervisor & Licensing Specialist

**Details** Background Check History

Background Check Details

Criminal Record Check Type	Status
BCI Only	Compliant
Date of Background Check	Non-Compliant Reason
11/1/2024	
Receipt Date	Comments
11/1/2024	
Review Date	Routed for Review Reason
11/13/2024	
Background Check Number	Study Number
BGC-0127	

The **Status** also shows Complaint on the **Contact Details** screen, **Background Check** tab.

Contact **James Dean**

Agency Job Title: Administrator Phone: (123) 456-1122 County:

Details **Background Checks** Other Documents Personnel History

Background Checks (2)

2 items • Sorted by Created Date • Updated 2 minutes ago

Background Check Number	Criminal Record Check Type	Date of Background Check	Status
1 <a href="#">BGC-0127</a>	BCI Only	11/1/2024	Compliant
2 <a href="#">BGC-0128</a>	FBI Only	11/1/2024	Pending

[View All](#)

10. When finished reviewing all Background Checks, from the **Contact Details** screen, click the **Other Documents** tab.



# Agency Certification Inquiry Supervisor & Licensing Specialist

The screenshot shows the 'Other Documents' tab selected in the 'Background Checks' section. The page displays a table with two items:

Background Check Number	Criminal Record Check Type	Date of Background Check	Status
1 <a href="#">BGC-0127</a>	BCI Only	11/1/2024	Compliant
2 <a href="#">BGC-0128</a>	FBI Only	11/1/2024	Compliant

A 'View All' link is located below the table.

The **Other Documents** screen appears, displaying any other **Personnel Documents**.

The screenshot shows the 'Other Documents' tab selected in the 'Personnel Document' section. The page displays a table with two items:

Document Id	Document Type	Receipt Date	Status
1 <input type="checkbox"/> <a href="#">DOCID-0000000067</a>	Proof of Degree	11/12/2024	Pending
2 <input type="checkbox"/> <a href="#">DOCID-0000000068</a>	Proof of Orientation Certificate	11/12/2024	Pending

A 'View All' link is located below the table.

11. Click on the **Document ID** to review the document.

The **Document Details** screen appears, defaulted to the Details Tab. All the fields with the **Edit Icon** next to them are **Editable**.

# Agency Certification Inquiry Supervisor & Licensing Specialist

Ohio Certification f... Cases 01187053 | Case James Dean | Contact

James Dean | Co... BGC-0127... DOCID-0...

Personnel Document  
**DOCID-000000067**

Edit Change Record Type Printable View

Document Type	Record Type	Receipt Date
Proof of Degree	Proof of Degree Document	11/12/2024

**Details** Document History

Information

Contact	Account
<a href="#">James Dean</a>	<a href="#">Happy Homes</a>
Document Type	Receipt Date
Proof of Degree	11/12/2024
Review Date	Status
	Pending
Comments	

**Files (1)**

BA Degree  
Nov 12, 2024 • 13KB • docx

View All

Here is where the **Licensing Specialist** and/or **Supervisor** will review the **Received Personnel Document**. See Below:

Ohio Certification f... Cases 01187053 | Case James Dean | Contact

James Dean | Co... BGC-0127... DOCID-0...

Personnel Document  
**DOCID-000000067**

Edit Change Record Type Printable View

Document Type	Record Type	Receipt Date
Proof of Degree	Proof of Degree Document	11/12/2024

**Details** Document History

Information

Contact	Account
<a href="#">James Dean</a>	<a href="#">Happy Homes</a>

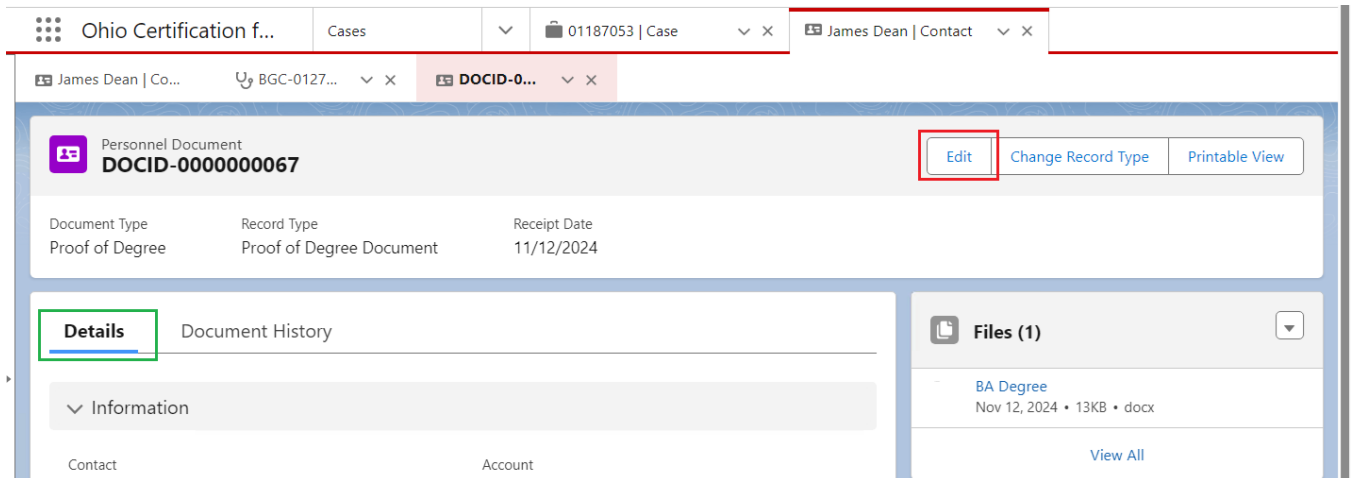
**Files (1)**

BA Degree  
Nov 12, 2024 • 13KB • docx

View All

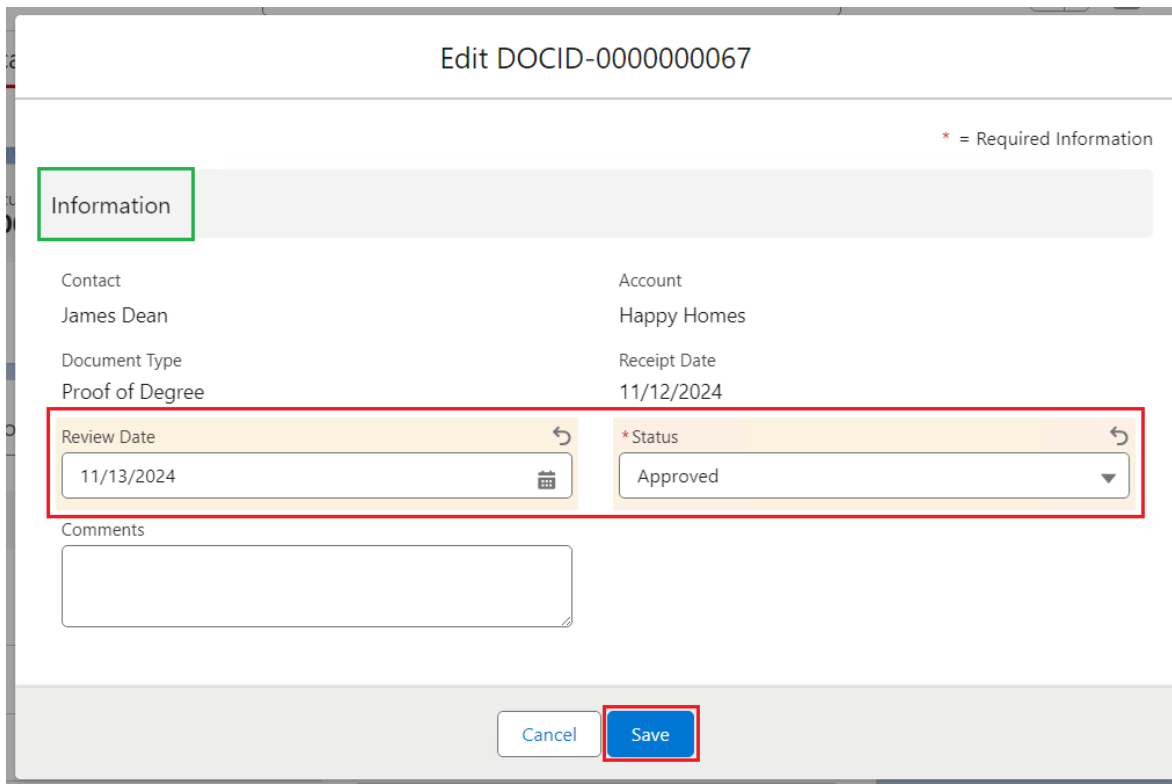
12. Once done reviewing, click the **Edit** button.

# Agency Certification Inquiry Supervisor & Licensing Specialist



An Edit box appears allowing the user to **Edit** the Status of the document.

13. Select a **Review Date**.
14. Select **Approved** from the **Status** dropdown menu.
15. Add **Comments** if needed.
16. Click the **Save** button.



A message will display verifying the document has been Saved. The Status on the Details screen is now updated to **Approved**.

# Agency Certification Inquiry Supervisor & Licensing Specialist

The screenshot shows a web interface for a Personnel Document. At the top, there are browser tabs for 'Ohio Certification f...', 'Cases', '01187053 | Case', and 'James Dean | Contact'. Below the tabs, there are more tabs for 'James Dean | Co...', 'BGC-0127...', and 'DOCID-0...'. The main content area is titled 'Personnel Document' with the ID 'DOCID-0000000067'. It includes buttons for 'Edit', 'Change Record Type', and 'Printable View'. Below this, there is a table with columns for 'Document Type', 'Record Type', and 'Receipt Date'. The 'Details' tab is selected, showing a table with fields like 'Contact', 'Account', 'Document Type', 'Receipt Date', 'Review Date', and 'Status'. The 'Review Date' and 'Status' fields are highlighted with a green box. To the right, there is a 'Files (1)' section showing a document titled 'BA Degree'.

## Changing the Inquiry Status

Once the inquiry has been reviewed and all documents received and approved, the **Status** of the inquiry can now be changed.

From the **Case Details** screen:

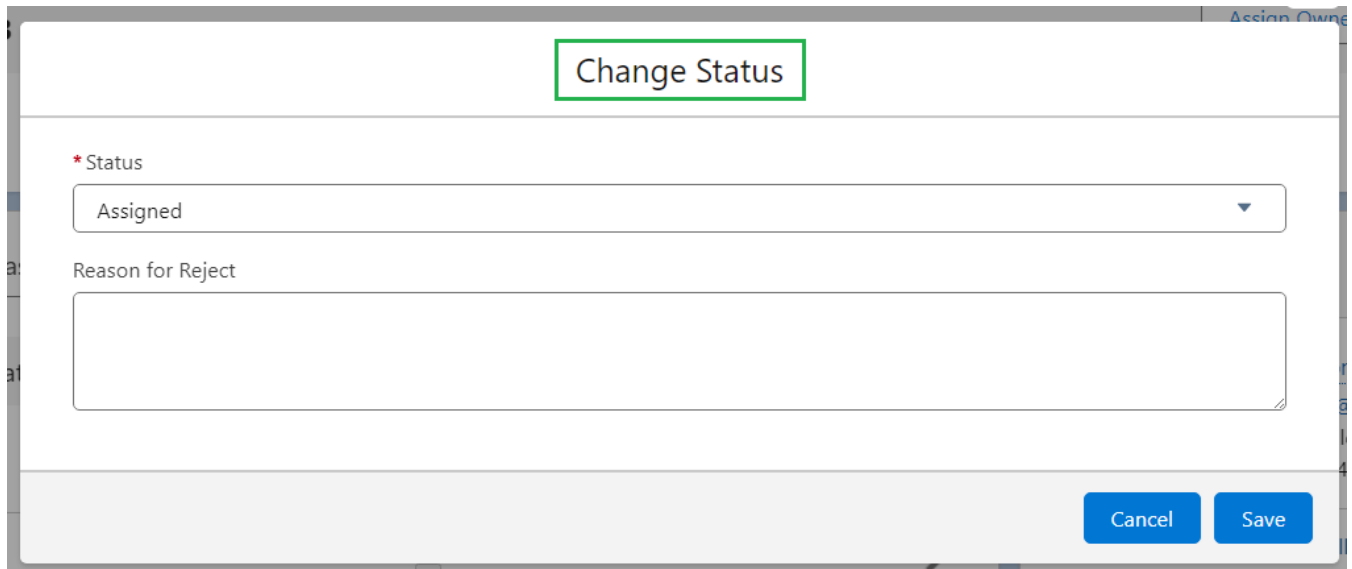
1. Click the **Change Status** button.

The screenshot shows a web interface for a Case Details page. At the top, there are browser tabs for 'Ohio Certification f...', 'Cases', '01187053 | Case', and 'James Dean | Contact'. Below the tabs, there are more tabs for 'James Dean | Co...', 'BGC-0127...', and 'DOCID-0...'. The main content area is titled 'Case' with the ID '01187053'. It includes buttons for 'Assign Owner' and 'Change Status'. Below this, there is a table with columns for 'Account Name', 'Status', 'Case Record Type', and 'Case Owner'. The 'Details' tab is selected, showing a table with fields like 'Account Name', 'Contact Name', and 'Unread'. The 'Change Status' button is highlighted with a red box. To the right, there is an 'Emails (1)' section showing an email titled 'Successful Inquiry Submission'.

A **Change Status** box appears.

## Agency Certification Inquiry Supervisor & Licensing Specialist

**Note:** The current **Status** will prepopulate within the Status field.

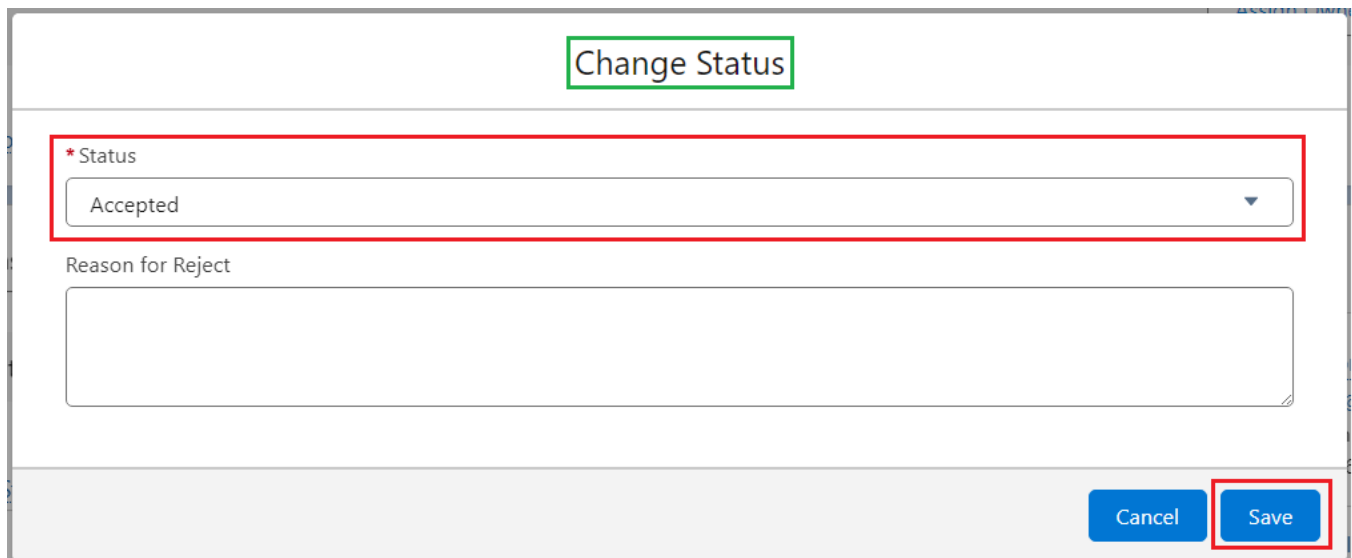


The screenshot shows a web form titled "Change Status" with a green border. The form contains a dropdown menu labeled "\* Status" with "Assigned" selected. Below it is a text area labeled "Reason for Reject". At the bottom right are "Cancel" and "Save" buttons.

2. Select **Accepted** from the **Status** dropdown menu.

**Note:** Other options in the Status dropdown menu include, Rejected. Closed, Duplicate/Submitted in Error, etc. If **Rejected** is selected, a **Narrative** is required.

3. Click the **Save** button.



The screenshot shows the same "Change Status" form, but now with "Accepted" selected in the "\* Status" dropdown menu. A red box highlights the dropdown menu and the "Save" button at the bottom right.

The **Case Details** screen displays. The Status now shows **Accepted**. See below:

# Agency Certification Inquiry Supervisor & Licensing Specialist

Case 01186802

Account Name: [Happy Homes](#)

Status: **Accepted**

Case Record Type: OCAF Agency Initial Certification Inquiry

Case Owner: [Lisa Licensing Specialist](#)

Buttons: Assign Owner, Change Status

Details | Case History

Case Information

Emails (1)

[Successful Inquiry Submission](#)

From the **My Open Agency Inquiries** screen, the Status has been updated to **Accepted**. See below:

Department of Job & Family Services

Search...

Ohio Certification f... Cases 01187053 | Case James Dean | Contact 01186802 | Case

My Open Agency Inquiries

2 items • Sorted by Case Number • Filtered by My cases - Case Record Type • Updated 4 minutes ago

Case ...	Account Name	Status	Contact ...	Email Address	U...	Submission D...	Owner Name	Last Modified...
1	011868... Together We A...	Assigned	James De...		<input checked="" type="checkbox"/>	10/8/2024 7:1...	Lisa Licensing ...	11/13/2024 12...
2	011870... Happy Homes	Accepted	James De...	lisa.oliver@chi...	<input checked="" type="checkbox"/>	11/12/2024 11...	Lisa Licensing ...	11/12/2024 3:...

If you need additional information or assistance, please contact the JFS DCY Customer Care Center at <https://odifs2.my.site.com/CustomerCareCenter>.