

Knowledge Base Article

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Overview

This user guide describes how to complete a Policy Revision as an Agency Administrator in the Ohio Certification for Agencies and Families (OCAF) system.

Functionality Location

Upon logging in to the OCAF Home Page:

- 1. Click on the down arrow in the banner section next to the app launcher, which is the nine-dot square in the upper left-hand corner of the page.
- 2. Select the Agency Policies from the list.



The Agency Policies section will appear.

- 1. The default filter will be **Recently Viewed** Agency Policies records, but you may change this view by adding filter criteria and save it by clicking the **pin icon** to change your settings.
- 2. Select My Agencies Polices from the dropdown list.
- 3. Select the Agency Policy Name hyperlink.

***	Ohio Certification f Ag	ency Poli	icies 🗸							
*	Agency Policies My Agency's Policies									
1 item •	Sorted by Agency Policy Name • Filtered by	All agenc	cy policies - Check if policies are own	ned	Updated a few seconds ago	Q Search this list		\$ • C A	C	Y
	Agency Policy Name 1	~ A	gency	\sim	Agency Application \checkmark	Created By	~	Last Modified Date	\sim	
1	PPD-00000019	Ha	lappy Homes		APP-000029	James Dean		1/22/2025 1:01 PM		•

The Agency Policy screen displays defaulting to the Policies tab.



Ohio Certification f	Agency Pc	olicies 🗸 🏕	PPD-00000019 Age			
Agency Policy Happy Homes					Create Policy, Plan, Document Revisi	on
Agency Policy Name A PPD-00000019 L	gency Type PE	Certified Agency Yes	Certification Status Active	Owner Lisa Licensing Specialist		
Policies Plans	Documents	Policy Revisions	Certificates	Compliance Reports		_
Approved Policies						
Policy Title				Document	Revision Date	
> O Access to Admin 5101:2-5-13(A)(*	nistrator Policy 19)			Testing Doc.docx	12/3/2024	
> O Assurance of Ch 5101:2-5-13(A)(2	ild's Civil Rights 25)			Testing Doc.docx	12/3/2024	

Making a Policy, Plan and/or Document Revision

1. To view policy revisions on any **Policies**, **Plans and/or Documents**, click the **Arrow** to show additional information.

olicies	Plans	Documents	Policy Revisions	Certificates	Compliance Reports		
pproved	Policies						
Policy	y Title			D	ocument	Revision Date	
✓ Ø Å	ccess to Admir	histrator Policy		Te	esting Doc.docx	12/3/2024	
5	101:2-5-13(A)(1	9)					
	Policy Revision	n History					
	Request Nun	nber	✓ Revision Type	~	Revision Date	Status	~
	REQ-0000026		Initial Certification		12/3/2024	Approved	
					12/2/2024	A	

2. To make a revision on Policies, Plans and/or Documents, click the **Create Policy, Plan, Document Revision** button.

Agency Happ	Policy y Homes					Create Policy, Plan, Document Revision
Agency Policy Na PPD-00000019	ame)	Agency Type LPE	Certified Agency Yes	Certification Status Active	Owner Lisa Licensing Specialist 🖍	
Policies	Plans	Documents	Policy Revisions	Certificates	Compliance Reports	
Approved	Policies					
Polie	cy Title				Document	Revision Date
 ✓ ✓ 	Access to Ad 5101:2-5-13(/	ministrator Policy A)(19)			Testing Doc.docx	12/3/2024



The Create Policy, Plan, Document Revision box displays.

- 3. The **Agency** is prepopulated.
- 4. Click the **Save** button.

	Create Policy, Plan, Document Revision		
Agency Policy			
* Agency			
Happy Homes		×	
		Cancel	ave

The **Policy Revisions** tab displays.

Details	Policy Revisions	Plan Revisions	Document Revisions	Related	
Policy Rev Listed below then you sho	isions are the required policies for uld select the N/A (Not App	r your agency's selected fun slicable) button.	ctions. Upload your written polic	y for each requirement below	r from your device. If there is a policy that you do not want to revise
Policy Titl	e		Document	Revision Date	
Access to A 5101:2-5-13	dministrator Policy (A)(19)				Upload Files Or drop files N/A
Assurance o 5101:2-5-13	of Child's Civil Rights (A)(25)				Lyload Files Or drop files N/A

5. Click the **Upload Files** button for all the appropriate Policies you need to revise.

Note: This is the same process for Policies, Plans and Documents tab.

etails Policy Revisions Plan	Revisions Document Revisions	Related	
Policy Revisions			
isted below are the required policies for your ager hen you should select the N/A (Not Applicable) bu	ncy's selected functions. Upload your written p utton.	oolicy for each requirement below f	from your device. If there is a policy that you do not want to revise
Policy Title	Document	Revision Date	
Access to Administrator Policy 5101:2-5-13(A)(19)			Lypload Files Or drop files N/A



6. Once you've selected your document, click the **Done** button. Repeat for each Policy you are revising.



7. The uploaded document now displays.

Details	Policy Revisions	Plan Revisions	Document Revisions	Related	
Policy Re	visions				
Listed below then you sho	v are the required policies fo ould select the N/A (Not Ap	r your agency's selected fur plicable) button.	nctions. Upload your written p	olicy for each requirement below	v from your device. If there is a policy that you do not want to revise
Policy Tit	tle		Document	Revision Date	
Access to 2 5101:2-5-1	Administrator Policy 13(A)(19)		Testing Doc.docx	1/22/2025	Remove
Assurance 5101:2-5-1	of Child's Civil Rights 13(A)(25)				Lyload Files Or drop files N/A

8. If there is a Policy that you do not want to Revise, then you should select the **N/A** (Not Applicable) button.

Details	Policy Revisions	Plan Revisions	Document Revisions	Related	
Policy Rev	visions are the required policies f	or your agency's selected fur	nctions. Upload your written poli	cy for each requirement belo	w from your device. If there is a policy that you do not want to revise
then you sho Policy Tit	ould select the N/A (Not Ap le	pplicable) button.	Document	Revision Date	
Access to A 5101:2-5-1	Administrator Policy 3(A)(19)		Testing Doc.docx	1/22/2025	Remove
Assurance 5101:2-5-1	of Child's Civil Rights 3(A)(25)				Upload Files Or drop files

Note: N/A will need selected for all Policy, Plan and Documents you are not making a revision on to move forward.

9. When completed Uploading Files or selecting N/A for each Policy, click the **Plan Revisions** tab.



Ohio Certification f	Agency Policies	✓	~ X		
Details Policy Revision	Plan Revisions	Document Revisions	Related		
Policy Revisions					
Listed below are the required polici then you should select the N/A (No	es for your agency's selecte t Applicable) button.	ed functions. Upload your written po	licy for each requirement below fro	om your device. If there is a policy t	that you do not want to revise
Policy Title		Document	Revision Date		
Access to Administrator Policy 5101:2-5-13(A)(19)		Testing Doc.docx	1/22/2025		Remove
Assurance of Child's Civil Rights 5101:2-5-13(A)(25)				Lupload Files Or drop fil	les N/A

The **Plan Revisions** screen displays.

10. Repeat steps 5-8 for all Plans listed.

Details Po	licy Revisions	Plan Revisions	Document Revisions	Related	
Plan Revisions					
Listed below are th should select the N	e required plans for y I/A (Not Applicable) b	our agency's selected funct utton.	ions. Upload your written plan fo	r each requirement below fr	om your device. If there is a plan that you do not want to revise then you
Plan Title			Document	Revision Date	
Disaster Prepared	dness Plan				
Foster Care Pre-F Proposal	Placement and Contin	uing Training Program			↓ Upload Files Or drop files N/A

11. When completed Uploading Files or selecting N/A for each Policy, click the **Document Revisions** tab.

Details	Policy Revisions	Plan Revisions	Document Revisions	Related							
Plan Revi	Plan Revisions Listed below are the required plans for your agency's selected functions. Upload your written plan for each requirement below from your device. If there is a plan that you do not want to revise then you										
should selec	should select the N/A (Not Applicable) button.										
Plan Title	2		Document	Revision Date							
Disaster Pr 5101:2-5-1	reparedness Plan 3.1(D)				Upload Files Or drop files N/A						

The **Document Revisions** screen displays.

12. Repeat steps 5-8 for all Documents listed.



Details	Policy Revisions	Plan Revisions	Document Revisions	Related						
Documer Listed below then you sh	Document Revisions Listed below are the required documents for your agency's selected functions. Upload your document for each requirement below from your device. If there is a document that you do not want to revise then you should select the N/A (Not Applicable) button.									
Docume	nt Title		Document	Revision Date						
Backgrour volunteers and foster 5101:2-5-0	nd checks for college intern s, employees, board preside caregivers 19.1	is, subcontractors, ents, officers, administrato	ors		↓ Upload Files Or drop files N/A					

13. When completed with uploading Revisions, click the **Submit Request** button at the top of the screen.

Note: You can Cancel your Revisions by click the Cancel Request button at any time.

Ohio Certification f	Agency Policies 🗸 🗸	¢ [‡] REQ-0000040 Po	licy v x			
Policy, Plan, Document Revision Happy Homes	n Request				Submit Request	Cancel Request
Agency Policy Status PPD-00000019 In Progres	Revision Type Policy Revision	Locked?	Revision Request Number REQ-0000040	Owner Lisa Licensing Specialist		
Details Policy Revisions	Plan Revisions	Document Revisio	ons Related			

A notification displays verifying the Revisions have been submitted.

The **Policy Revision** screen displays, showing the submitted revisions.

•••	Ohio Cer	ification f	Agency Policies	~	¢ [¢] REQ-0000040 Po	olicy 🗸 🗙		
¢°	Policy, Pla Happy	n, Document Revision Homes	n Request					Cancel Request
Ager PPD	ncy Policy -00000019	Status Submitted	Revision Type Policy Revision		Locked?	Revision Request Number REQ-0000040	Owner Lisa Licensing Specialist	
D	etails	Policy Revisions	s Plan Revisions		Document Revisi	ions Related		
P Li th	colicy Revision isted below a men you shou	ions e the required policie d select the N/A (Not	s for your agency's selecte Applicable) button.	d funct	ions. Upload your writ	tten policy for each requireme	ent below from your device. If there	Expand All Collapse All is a policy that you do not want to revise
	Policy	Title			Document	Revisi	on Date	
	> Access	to Administrator Poli	cy		Testing Doc.do	ocx 1/2	2/2025	

14. Click the **Details** tab.



The Status now displays as Submitted.

Department of Job & Family Services	Q	Search			*• 🖩 🏟 ? 📮 🐻	
Ohio Certification f	Agency Policies 🗸 🗸	¢ [©] REQ-0000040 Policy				
Policy, Plan, Document Revision Happy Homes	n Request				Cancel Request	
Agency Policy Status PPD-00000019 Submitted	Revision Type Policy Revision	Locked? R	evision Request Number EQ-0000040	Owner Lisa Licensing Specialist		
Details Policy Revisions	Plan Revisions	Document Revision	s Related			
✓ Request Details						
Revision Request Number REQ-0000040			Status Submitted			
Revision Type Policy Revision						

The Revisions have been routed to a Licensing Specialist. You will receive a **Notification** within the OCAF system if the revisions have been Approved or if further information is needed. See below:

- 1. Click the Notification button.
- 2. Click the **Policy Review Request** notification.



You will be Navigated to the Policy, Plan, Document Revision Request screen.

The Status has been updated to Approved.



Ohio Certification f		Home	~	¢ [≉] REQ-0000040	Policy 🗸 🗙	
Policy, Pl Happy	an, Document Revision R <mark>/ Homes</mark>	lequest				
Agency Policy PPD-00000019	Status Approved	Revision Type Policy Revision		Locked?	Revision Request Number REQ-0000040	Owner Lisa Licensing Specialist
Details	Policy Revisions	Plan Revisions		Document Revis	sions Related	

If you have additional questions pertaining to this Deployment Communication, please contact the <u>Customer Care Center</u>.

