

Documenting an Agency Visit



Knowledge Base Article

Documenting an Agency Visit

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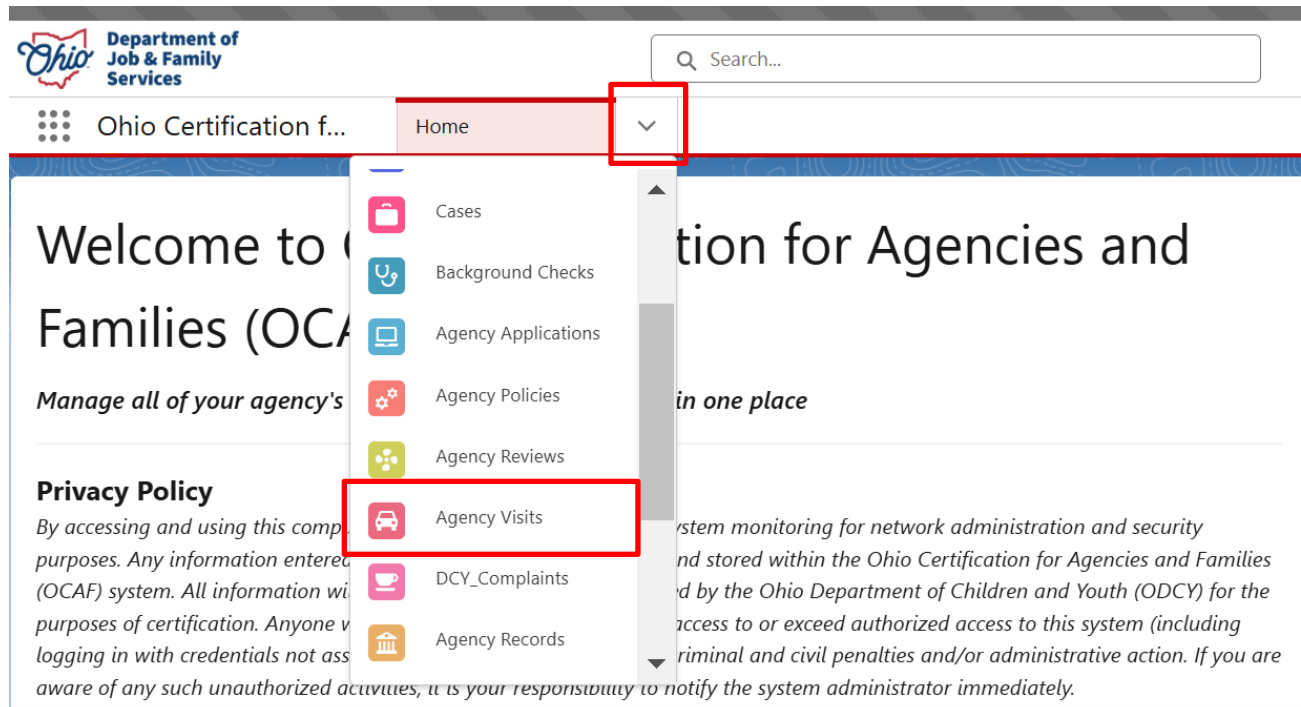
Overview

This user guide describes how to create an Agency Visit record as a State Licensing Specialist, Licensing Supervisor or Bureau Chief in the Ohio Certification for Agencies and Families (OCAF) system.

Functionality Location

Upon logging in to the OCAF Home Page:

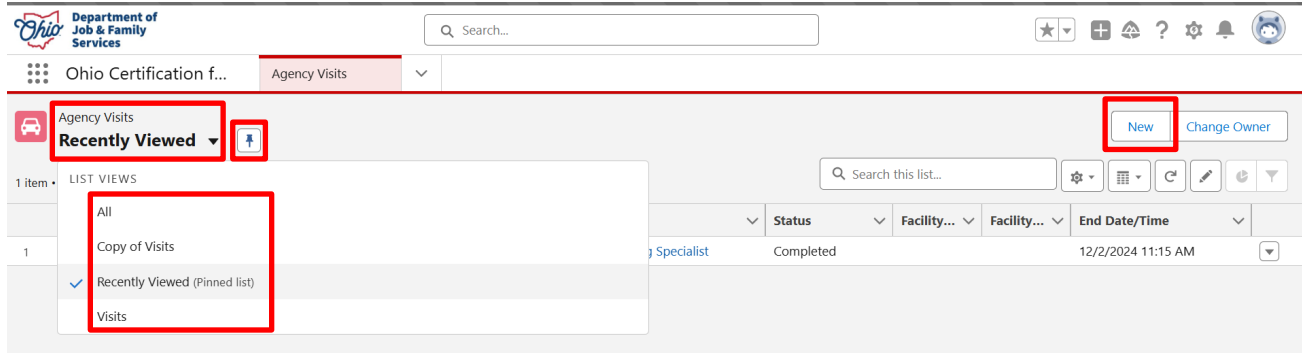
1. Click on the down arrow in the banner section next to the app launcher, which is the nine-dot square in the upper left hand corner of the page.
2. Select the **Agency Visits** value from the list.



The Agency Visits section will appear.

3. The default filter will be **Recently Viewed** Agency Visit records, but you may change this view and save it by selecting the most appropriate list view and clicking the pin icon to change your settings.
4. Click the **New** button to begin a new Agency Visit record.

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The **New Agency Visit** template appears.

Creating an Agency Visit Record

All fields marked with a red asterisk (*) will be required.

1. The **Owner** will default to the logged-in user's name.
2. Begin typing the **Agency Name** where the visit occurred. The system will present the agency names which most closely match the entered text. Once the name appears, click on it to populate this field.
3. Begin typing the **Facility Name** where the visit occurred. The system will present the agency names which most closely match the entered text. Once the name appears, click on it to populate this field.
4. Enter the **Start Date/Time** and **End Date/Time** by either entering the date in MM/DD/YYYY format or selecting the day from the Calendar icon. Select the time by clicking on the Clock icon and choosing the time.
5. Select the **Contact Type** from the values of:
 - Announced Site Visit
 - Unannounced Site Visit
 - Email
 - Phone Call To
 - Phone Call From
 - Video Conference
6. Select a response to **Non-Traditional/Traditional Visit?** from the values of:
 - No, regular business hours
 - Yes, non-traditional hours
 - Yes, weekend visit
7. Type in the names of any **Individuals Contacted**.
8. Type in a **Narrative**.
9. Enter in an associated **Agency Review**, if applicable. By clicking in the box, the system will present recently viewed review records, and you may search by number, beginning with AR-. **Note:** You may associate an **Agency Review** later.

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10. If you are done with all fields, you may place the **Status** of your visit record into **Completed**. Otherwise, you can maintain the default status of **Draft**.
11. Click **Save** to retain the record to the database, **Cancel** to erase it or **Save & New** to retain the record to the database and begin a new record with a blank template.

New Agency Visit

* = Required Information

Visit Information

Owner
Sara Licensing Specialist

Agency Name
Search Accounts...

Facility Name
Search Accounts...

Facility Address

* Contact Type
--None--

Non-traditional/Traditional visit?
--None--

Individuals Contacted

Agency Review
Search Agency Reviews...

Created By

Start Date/Time
* Date * Time

End Date/Time
* Date * Time

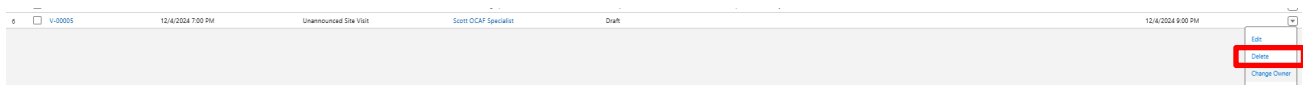
Status
Draft

* Narrative

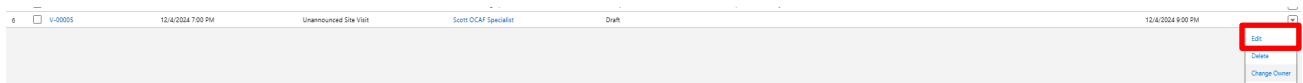
[Cancel](#) [Save & New](#) [Save](#)

Editing/Deleting/Cloning/Creating in Error Agency Visits Records

1. To delete an **Agency Visits** record in **Draft** status, navigate to the list page, and select **Delete** from the arrow next to the record.



2. To edit an existing **Agency Visits** record in **Draft** status, navigate to the list page, and select **Edit** from the arrow next to the record.



3. To mark an **Agency Visits** record in **Completed** status as **Created in Error**, click on the record number hyperlink, click the pencil icon next to the question and check the **Created in Error** box found on the inside of the Visit Information screen.

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Agency Visit V-00002

Clone Printable View New Agency Review

Visit Information

Owner	Sara Licensing Specialist	Created By	Sara Licensing Specialist 12/5/2024 11:48 AM
Agency Name	LIGHT & Love Homes for Youth	Start Date/Time	12/4/2024 8:00 PM
Facility Name	Love Home	End Date/Time	12/4/2024 9:15 PM
Facility Address	2228 West Powell Rd., Powell, Ohio, 43065	Status	Created in Error
Contact Type	Unannounced Site Visit		
Non-traditional/Traditional visit?	Yes, non-Traditional hours		This is test narrative.
Individuals Contacted			
Agency Review			

4. An existing record can be copied to create a new record by selecting the Clone button when you click into a visit record. The system will create a new record number with all the existing data which you can then modify as needed.

Agency Visit V-00002

Clone Printable View New Agency Review

Visit Information

Owner	Sara Licensing Specialist	Created By	Sara Licensing Specialist 12/5/2024 11:48 AM
Agency Name	LIGHT & Love Homes for Youth	Start Date/Time	12/4/2024 8:00 PM
Facility Name	Love Home	End Date/Time	12/4/2024 9:15 PM
Facility Address	2228 West Powell Rd., Powell, Ohio, 43065	Status	Completed
Contact Type	Unannounced Site Visit		Created in Error
Non-traditional/Traditional visit?	Yes, non-Traditional hours		Narrative
Individuals Contacted			This is test narrative.
Agency Review			

Additional Notes

1. To enter a **Start/End Time** outside of the 15 minute increments, you first need to select the time which closely matches it and modify the entry once selected, you cannot add the time manually to start, such as 12:05 pm.
2. Although the system will present the **Edit** and **Delete** options next to visits in the status of **Completed** on the list page, you will not be able to perform either of those functions. The only thing that can be done after the visit is placed in **Completed** status is to mark it **Created in Error** (see above).

Visit Information

Owner	Sara Licensing Specialist	Created By	Sara Licensing Specialist 12/5/2024 11:57 AM
Agency Name	Tranquil Oasis Wellness Home for Youth	Start Date/Time	12/1/2024 5:00 PM
Facility Name	Tranquil Oasis Facility Child Residential Center	End Date/Time	12/1/2024 6:00 PM
Facility Address	8675309 Test Street, Boardman, Ohio, 44512	Status	Completed
Contact Type	Unannounced Site Visit		Created in Error
Non-traditional/Traditional visit?	Yes-weekend visit		Narrative
Individuals Contacted	Person 1, 2 and 3		Weekend narrative visit
Agency Review			

3. All **Agency Visits** will be compiled on one shared list. However, the list can be filtered and customized to a view for your preferences.

If you need additional information or assistance, please contact the Bureau of Children Services Operational Support's [Customer Care Center](#).