

OCAF Initial Certification Application Initial Review – Licensing Specialist



Knowledge Base Article

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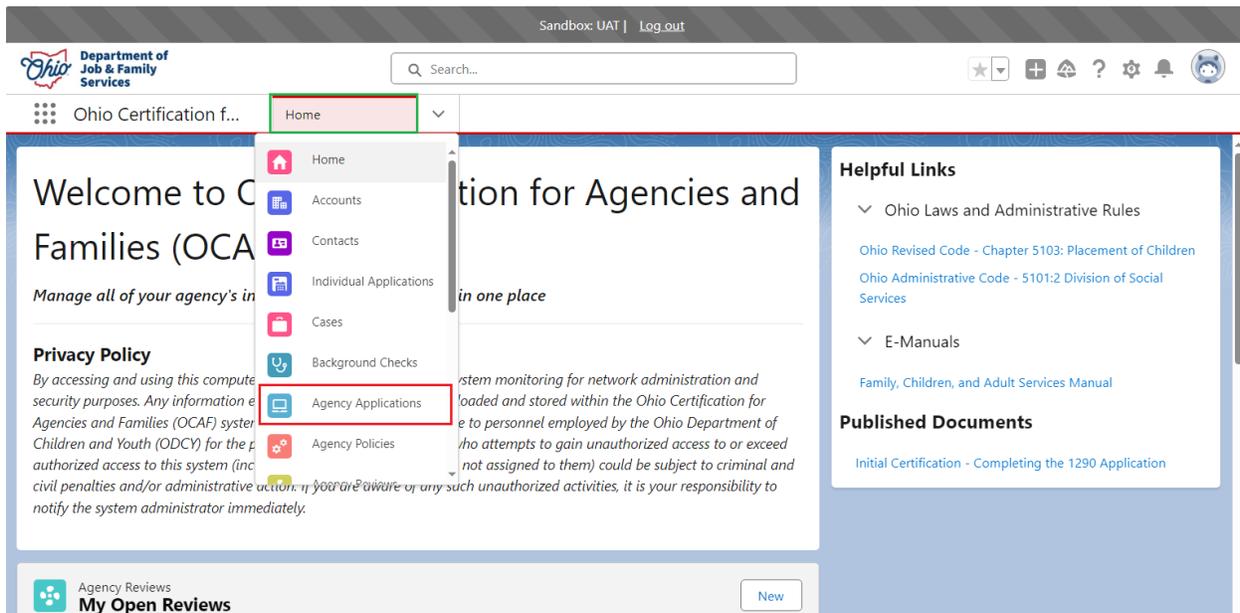
Overview

This User Guide describes how a Licensing Specialist completes the Initial Certification Application Review within the Ohio Certification for Agencies and Families (OCAF) system.

Navigating to the Applications

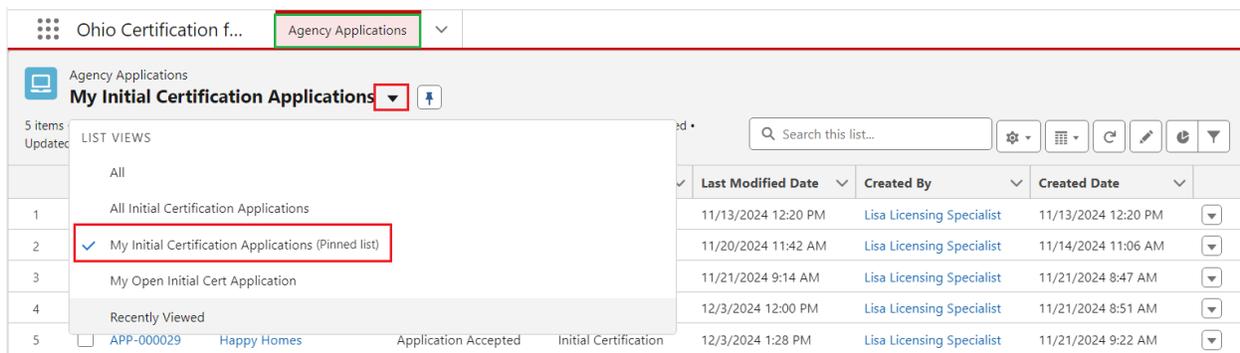
From the **OCAF Home** tab:

1. Select **Agency Applications** from the dropdown menu.



The **Agency Applications** screen displays with the user's pinned list view.

2. Select **My Initial Certification Applications** from the dropdown menu.



The **My Initial Certification Application** list displays.

Reviewing the Application

3. Click on the appropriate **Application Number**.

<input type="checkbox"/>	Applica... ↑ ↓	Agency	Status	Record Type	Last Modified Date	Created By	Created Date
1	<input type="checkbox"/> APP-000015	Together We Are Strong	New	Initial Certification	11/13/2024 12:20 PM	Lisa Licensing Specialist	11/13/2024 12:20 PM
2	<input type="checkbox"/> APP-000016	Testing Agency	In Progress	Initial Certification	11/20/2024 11:42 AM	Lisa Licensing Specialist	11/14/2024 11:06 AM
3	<input type="checkbox"/> APP-000027	Happy Agency	In Progress	Initial Certification	11/21/2024 9:14 AM	Lisa Licensing Specialist	11/21/2024 8:47 AM
4	<input type="checkbox"/> APP-000028	Happy Hearts	In Progress	Initial Certification	12/3/2024 12:00 PM	Lisa Licensing Specialist	11/21/2024 8:51 AM
5	<input type="checkbox"/> APP-000029	Happy Homes	Submitted	Initial Certification	12/3/2024 1:28 PM	Lisa Licensing Specialist	11/21/2024 9:22 AM

The application **Details** screen displays defaulting to the Details tab.

Agency Application
Happy Homes

Application Number: APP-000029 | Record Type: Initial Certification | Status: Submitted | Owner: Lisa Licensing Specialist

Details | Agency Information | Personnel | Policies, Plans And Documents | More

Application Information

- Record Type: Initial Certification (Editable)
- Status: Submitted (Editable)
- Application Number: APP-000029
- Owner: Lisa Licensing Specialist (Editable)
- Is this an adoption agency?
- Completed Date
- Return Reasons (Editable)

Checklist | Activity

Initial Certification Checklist

- [Edit](#)
- General Agency Information
- Function(s) - Branches and/or Facilities
- Policies/QRTP Checklist
- Plans

Details Tab

4. Review the **Details** tab information.

Note: Sections with this  icon are Editable.

OCAF Initial Certification Application Initial Review – Licensing Specialist

Details Agency Information Personnel Policies, Plans And Documents More ▾

▾ Application Information

Record Type Initial Certification	Status Submitted
Application Number APP-000029	Owner Lisa Licensing Specialist
Is this an adoption agency? <input type="checkbox"/>	Completed Date
Return Reasons	

▾ Submission Information

Initial Submittal Date/Time 12/3/2024 10:43 AM	Submittal Count 1
Most Recent Submittal Date/Time 12/3/2024 10:43 AM	

▾ Summary Information

Number of Visit/Days to Complete Review	
Policy Review Summary	
Summary of Verbal Technical Assistance	
Overall Summary and Recommendation	
Supervisor Review and Recommendation	
Chief Review and Recommendation	

▾ Signature Information

Agency Administrator Signature 	Board President Signature 
Agency Admin Signed By James Dean	Board President Signed By George Dean
Agency Admin Signed Date 12/3/2024 10:34 AM	Board President Signed Date 12/3/2024 10:43 AM
Agency Admin Acknowledgment <input checked="" type="checkbox"/>	Board President Acknowledgment <input checked="" type="checkbox"/>

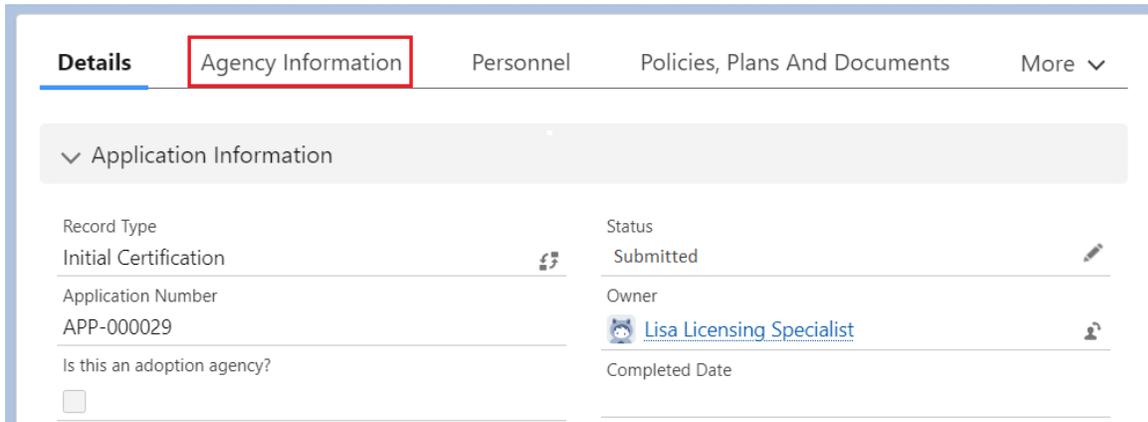
▾ System Information

Created By Lisa Licensing Specialist , 11/21/2024 9:22 AM	Last Modified By Lisa Licensing Specialist , 12/3/2024 1:28 PM
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When done reviewing the **Details** tab, scroll back to the top of the page.

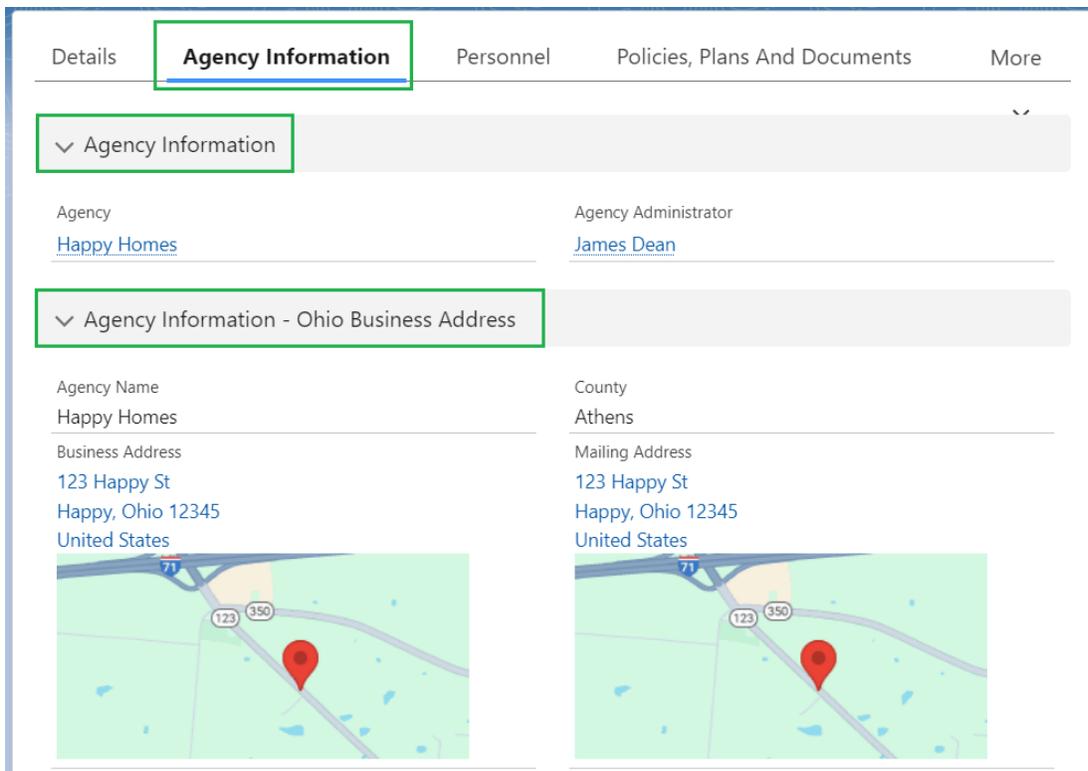
Agency Information Tab

1. Click on the **Agency Information** tab.



The **Agency Information** screen displays.

2. **Review Agency Information** tab.



OCAF Initial Certification Application Initial Review – Licensing Specialist

Functions

1. Children's Residential Center(s)

2. Group Home(s)

3. Residential Parenting Facilities

4. Independent Living Arrangements

5. Family FH Certification

6. Treatment FH Certification

7. Medically Fragile FH Certification

8. Pre-adoptive Infant FH Certification

9. Accept Custody of Children

10. Place Children for FC or Adoption ⓘ

11. Placement of children in foster homes ⓘ

12. Placement of children for adoption ⓘ

13. Children's Crisis Care Facilities

14. PNTWC

15. Scholars Residential Center(s)

16. Residential Infant Care Center(s)

Agency Administrator Information

Preferred Prefix

Last Name

Dean

Involved in another Certified Agency?

List of agency's administrator involved

First Name

James

Email Address

@childrenandyouth.ohio.gov

Phone Number

(123) 456-1122

Administrator Address

123 Happy St
Happy, Ohio 12345
United States



▼ Agency Details

Proposed Purpose of the Agency
Place children for Foster Care or Adoption;Participate in Placement in Foster Care;Participate in Placement in Adoption

Proposed Custody Arrangement
Be licensed to take custody of children

Anticipated Sources Of Child Referral
Contract with county children services agencies who need to place children in care;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 Agency Details

Fiscal Year
State

Fiscal Starting Month Fiscal Ending Month

When done reviewing the **Agency Information** tab, scroll back to the top of the page.

Personnel Tab

1. Click the **Personnel Tab**.

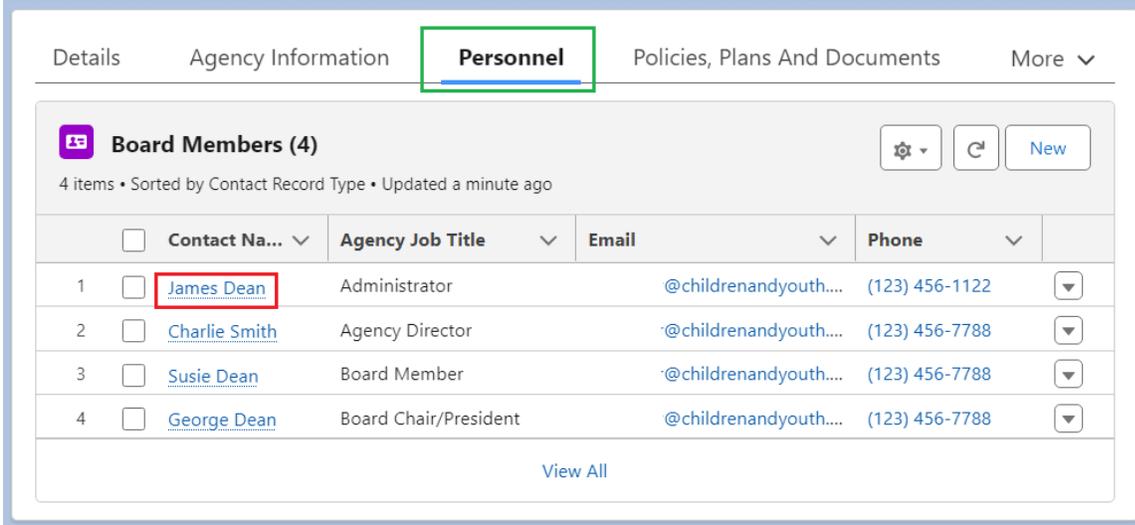
Details **Agency Information** **Personnel** Policies, Plans And Documents More

▼ Agency Information

Agency [Happy Homes](#) Agency Administrator [James Dean](#)

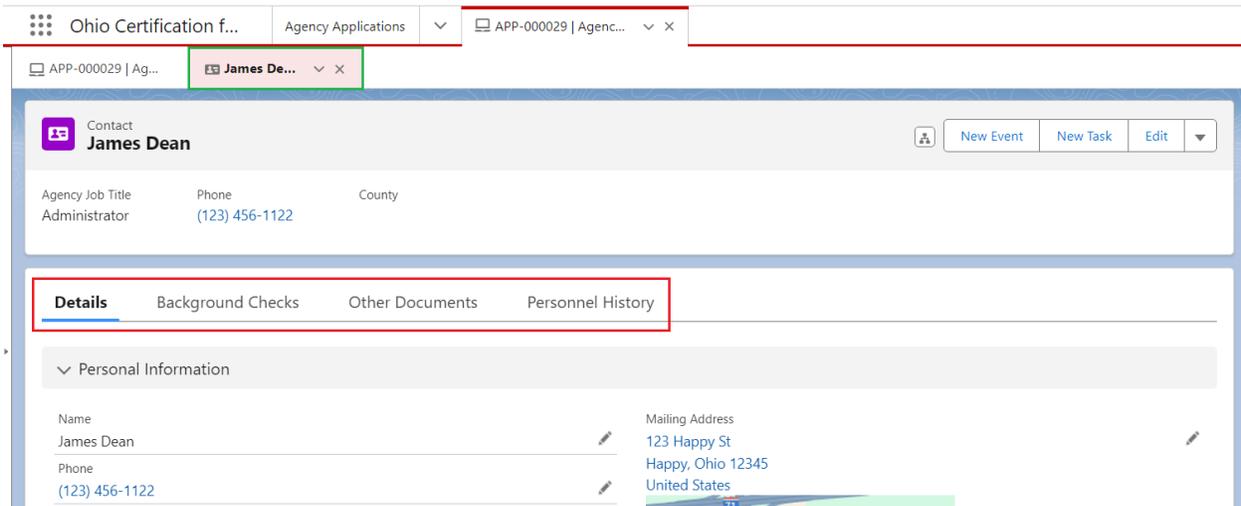
The **Personnel tab** screen displays.

2. To view any of the **Board Members** information, click their **Contact Name**.



The **Contact Details** screen displays.

3. To view **Background Checks, Other Documents and Personnel History**, click on the appropriate tabs.



For additional information on reviewing Background Checks, Other Documents and Personnel History, please refer to this User Guide [Agency Certification Inquiry Background Check Review](#)

4. When completed reviewing the Contact, click the **Application Number** tab. Shown as APP-#####.

The screenshot shows a web application interface. At the top, there are navigation tabs: 'Ohio Certification f...', 'Agency Applications', and 'APP-000029 | Agenc...'. Below this, a sub-tab 'APP-000029 | Ag...' is active, showing a contact card for 'James Dean'. The card includes fields for 'Agency Job Title' (Administrator), 'Phone' ((123) 456-1122), and 'County'. Below the card are tabs for 'Details', 'Background Checks', 'Other Documents', and 'Personnel History'. The 'Details' tab is selected, showing a 'Personal Information' section with fields for 'Name' (James Dean), 'Mailing Address' (123 Happy St, Happy, Ohio 12345, United States), and 'Phone' ((123) 456-1122).

The **Agency Application Personnel** tab displays.

Policies, Plans and Documents

1. Click the **Policies, Plans and Documents** tab.

The screenshot shows the 'Policies, Plans and Documents' tab selected in the application. The tab is highlighted with a red box. Below the tab, there is a section for 'Board Members (4)' with a table listing members. The table has columns for 'Contact Name', 'Agency Job Title', 'Email', and 'Phone'. Two members are listed: James Dean (Administrator) and Charlie Smith (Agency Director).

	Contact Na...	Agency Job Title	Email	Phone	
1	James Dean	Administrator	@childrenandyouth...	(123) 456-1122	▼
2	Charlie Smith	Agency Director	@childrenandyouth...	(123) 456-7788	▼

The **Policies, Plans and Documents** screen displays.

2. Click the **Agency Policy Name** hyperlink.

The screenshot shows the 'Policies, Plans and Documents' tab selected, highlighted with a green box. Below the tab, there is a section for 'Policies, Plans and Documents (1)' with a table listing policy names. The table has a column for 'Agency Policy Name'. One policy is listed: PPD-00000019, which is highlighted with a red box.

	Agency Policy Name	
1	PPD-00000019	▼

View All

The **Policies** screen displays, defaulting to the Policies tab.

Agency Policy Name	Agency Type	Certified Agency	Certification Status	Owner
PPD-0000024	LPE		Submitted	Lisa Licensing Specialist

Policy Title	Document	Revision Date
Access to Administrator Policy 51012-5-13(A)(19)	Testing Doc.docx	12/3/2024
Assurance of Child's Civil Rights 51012-5-13(A)(25)	Testing Doc.docx	12/3/2024
Confidentiality 51012-5-13(A)(21)	Testing Doc.docx	12/3/2024
Discharge Policy 51012-5-13(A)(18)	Testing Doc.docx	12/3/2024
Discipline Policy 51012-5-13(A)(1)	Testing Doc.docx	12/3/2024
Human Research Projects 51012-5-13(A)(22)	Testing Doc.docx	12/3/2024

3. Click the **Expand All** button.
4. Each question will need to be answered with **Yes, No or N/A**.

Note: If **No** is selected, a **Comment** must be entered. (Required)

5. Click the **Save to Review History** button for each question answered.
6. **Repeat steps #4 and #5** for each question.

Note: The **Policy Questions** listed are required policies for the Functions(s) the user selected during their Application. The policies listed will be different depending on the function each user selected.

OCAF Initial Certification Application Initial Review – Licensing Specialist

Policies Plans Documents

Policies Expand All Collapse All

Policy Title	Document	Revision Date
✓ Access to Administrator Policy 5101:2-5-13(A)(19)	Testing Doc.docx	12/3/2024

Does the policy specify the procedures for ensuring the accessibility of the administrator or designee with executive authority to agency staff and ODJFS representatives at all times as required by OAC 5101:2-5-13(A)(19)?

Yes No N/A

Comments

> Review History

Once the **Save to Review History** button is clicked, you may view the **Review History** grid. See below.

Policy Title **Document** **Revision Date**

✓ Access to Administrator Policy 5101:2-5-13(A)(19)	Testing Doc.docx	12/3/2024
--	------------------	-----------

Does the policy specify the procedures for ensuring the accessibility of the administrator or designee with executive authority to agency staff and ODJFS representatives at all times as required by OAC 5101:2-5-13(A)(19)?

Yes No N/A

Comments

> Review History

Date	Review Status	Comment
12/3/2024	Yes	

Note: The user can Save the answer to Review History multiple times and the system will document it within the grid.

When done answering all the questions, scroll to the top of the page.

7. Click the **Plans** tab.

The screenshot shows the 'Policies' screen with three tabs: 'Policies', 'Plans', and 'Documents'. The 'Plans' tab is highlighted with a red box. Below the tabs, there is a table with the following data:

Policy Title	Document	Revision Date
> <input checked="" type="checkbox"/> Access to Administrator Policy 5101:2-5-13(A)(19)	Testing Doc.docx	12/3/2024
> <input checked="" type="checkbox"/> Assurance of Child's Civil Rights 5101:2-5-13(A)(25)	Testing Doc.docx	12/3/2024

The **Plans** screen displays.

The screenshot shows the 'Plans' screen with three tabs: 'Policies', 'Plans', and 'Documents'. The 'Plans' tab is highlighted with a green box. Below the tabs, there is a table with the following data:

Plan Title	Document	Revision Date
> Disaster Preparedness Plan 5101:2-5-13.1(D)	Testing Doc.docx	12/3/2024

8. Click the **Expand All** button.
9. Each question will need to be answered with **Yes, No or N/A**.

Note: If **No** is selected, a **Comment** must be entered. (Required)

10. Click the **Save to Review History** button for each question answered.
11. **Repeat steps #8 and #9** for each question.

Note: The **Plan Questions** listed are required plans for the Functions(s) the user selected during their Application. The plans listed will be different depending on the function each user selected.

The screenshot shows the 'Plans' screen with three tabs: 'Policies', 'Plans', and 'Documents'. The 'Plans' tab is highlighted with a green box. Below the tabs, there is a table with the following data:

Plan Title	Document	Revision Date
<input checked="" type="checkbox"/> Disaster Preparedness Plan 5101:2-5-13.1(D)	Testing Doc.docx	12/3/2024

Below the table, there is a question: "Does the plan include procedures for tracking clients and substitute caregivers as required by OAC 5101:2-5-13.1(D)(5)?"

There are three radio buttons: Yes, No, and N/A. The 'Yes' button is highlighted with a red box.

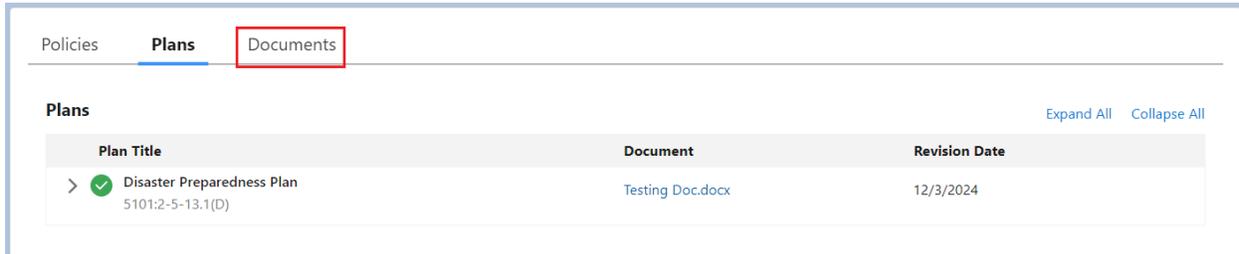
Below the radio buttons, there is a 'Comments' field with a text area and a 'Save to Review History' button. The 'Save to Review History' button is highlighted with a red box.

At the bottom, there is a 'Review History' link with a right-pointing arrow.

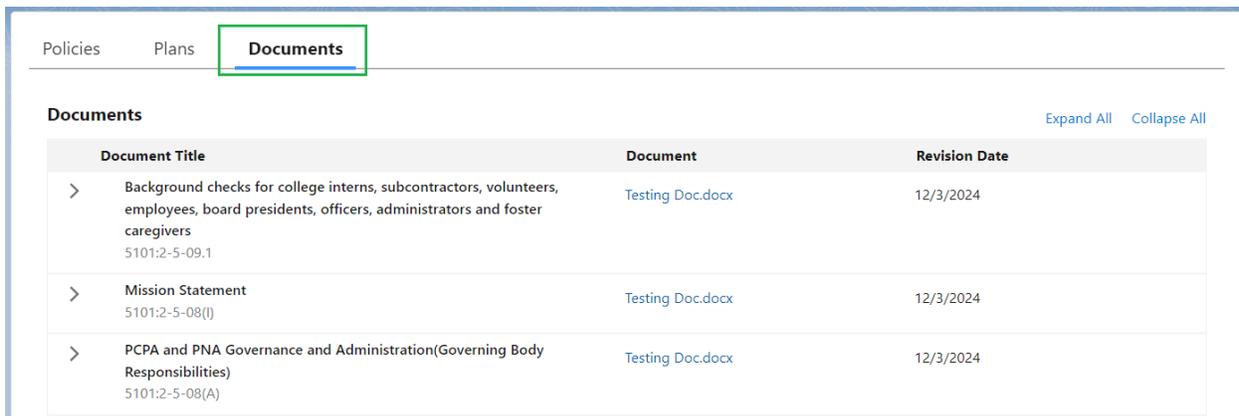
Note: The user can Save the answer to Review History multiple times and the system will document it within the grid.

When done answering all the questions, scroll to the top of the page.

12. Click the **Documents** tab.



The **Documents** screen displays.



13. Click the **Expand All** button.

14. Each question will need to be answered with **Yes, No or N/A**.

Note: If **No** is selected, a **Comment** must be entered. (Required)

15. Click the **Save to Review History** button for each question answered.

16. **Repeat steps #14 and #15** for each question.

Note: The **Document Questions** listed are required plans for the Functions(s) the user selected during their Application. The plans listed will be different depending on the function each user selected.

When done answering all the questions, scroll to the top of the page.

17. Click on the **Application Number** to return to the Application. Example APP-#####.

The **Agency Application Details** tab displays.

Branches and Facilities

1. Click the **More** tab.
2. Select **Branches and Facilities** from the dropdown menu.

The screenshot shows the 'Details' tab selected. The 'More' dropdown menu is open, and the 'Branches & Facilities' option is highlighted. The main content area shows application information such as 'Record Type: Initial Certification', 'Status: Submitted', 'Application Number: APP-000028', and 'Owner: Lisa Licensing Specialist'.

The **Branches and Facilities** screen displays.

Note: If the applicant listed additional branches or facilities, they will be listed here. If the applicant did not list any, there will be nothing shown here.

The screenshot shows the 'Branches & Facilities' screen. It features two main sections: 'Branches (1)' and 'Facilities (1)'. Each section contains a table with columns for Account Name, Status, Service Delivery Area, County, and Total Number of Children. The 'Branches' table lists 'Testing Branch' in Adams county. The 'Facilities' table lists 'Test Facility' in Adams county with 6 children. 'View All' links are provided for both sections.

- To view **Branch information**, click the **Account Name** hyperlink on the appropriate record.

The screenshot shows the 'Branches & Facilities' tab selected. Under 'Branches (1)', there is one entry: 'Testing Branch' in Adams County. Under 'Facilities (1)', there is one entry: 'Test Facility' in Adams County with a total of 6 children.

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

4. **Review** the Branch Details screen.

The 'Branch Details' screen shows the following information:

- Branch Information:**
 - Agency Number: OFCLA-557791
 - Account Name: Testing Branch
 - Status: [Blank]
 - Service Delivery Area (SDA): [Blank]
 - Effective Date: [Blank]
 - End Date: [Blank]
- Contact Information:**
 - Branch Supervisor: Test Sup
 - Branch Supervisor Title: Test
 - Inquiry Primary Email: [Blank]
 - Inquiry Secondary Email: [Blank]
 - Business Address: 123 Happy St, Happy, Ohio 12345, United States

OCAF Initial Certification Application Initial Review – Licensing Specialist

Phone ⓘ
(123) 456-7788

Fax

County
Adams

Mailing Address
United States

System Information

Parent Account
[Happy Homes](#)

Account Owner
[James Dean](#)

Created By
[James Dean](#), 11/21/2024 9:32 AM

Last Modified By
[James Dean](#), 11/21/2024 9:32 AM

5. To view branch history, click the **Branch History** tab.

Details **Branch History**

Account History (2)

Date	Field	User	Original Value	New Value
11/21/2024 9:32 AM	Created.	James Dean		
11/21/2024 9:32 AM	Business State/Provin...	James Dean		OH

[View All](#)

Activity Chatter

Filters: All time • All activities • All types

[Refresh](#) • [Expand All](#) • [View All](#)

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

6. When done reviewing Branch Details, return to the Branch and Facilities screen by clicking the **Application Number**. Shown below:

Ohio Certification f... Agency Applications APP-000028 | Agenc... APP-000029 | Agenc...

APP-000029 | Ag... Testing B...

Details Branch History

Branch Information

Activity Chatter

The **Branches and Facilities** screen display.

7. To view facilities, click the **Account Name** hyperlink on the appropriate facility.

The screenshot shows the 'Branches & Facilities' tab. It contains two sections: 'Branches (1)' and 'Facilities (1)'. The 'Branches (1)' section has a table with columns: Account Name, Status, Service Delivery Area, and County. The 'Facilities (1)' section has a table with columns: Account Name, Status, County, and Total Number of Children. The 'Test Facility' link is highlighted with a red box.

Account Name	Status	Service Delivery Area ...	County
Testing Branch			Adams

Account Name	Status	County	Total Number of Child...
Test Facility		Adams	6

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

8. **Review** the Details tab.

The screenshot shows the 'Facility Details' screen. The 'Details' tab is selected. The 'Facility Information' section shows fields for Agency Number, Account Name, Facility Type, Total Number of Children, and Gender of Children. The 'Age Range' section shows fields for From Age Years, To Age Years, From Age Months, and To Age Months. The 'Activity' tab is also visible on the right side.

Agency Number	Status
OFCLA-557792	

Account Name	Certifying Entity
Test Facility	

Facility Type	Effective Date
Child Residential Center	11/21/2024

Total Number of Children	End Date
6	

Gender of Children
Both Male/Female

From Age Years	To Age Years
17	5

From Age Months	To Age Months
0	10

OCAF Initial Certification Application Initial Review – Licensing Specialist

▼ Contact Information

Facility Director Name		Business Address	
Test Director		222 Happy St	
Phone		Happy, Ohio 12345	
(123) 456-7788		United States	
Fax			
		County	
		Adams	

▼ SACWIS Information

▼ System Information

Account Owner		Created By	
James Dean		James Dean, 11/21/2024 9:34 AM	
		Last Modified By	
		James Dean, 11/21/2024 9:35 AM	

9. When done reviewing the Details tab, click the **Living Units** tab.

Note: If the applicant listed additional Living Units, they will be listed here. If the applicant did not list any, there will be nothing shown here.

Details **Living Units** Facility History

Living Units (1)

1 item • Sorted by Living Unit Number • Updated a few seconds ago

<input type="checkbox"/>	Living Unit Number ↓		Total Number of Children	
1	LU-0000016		6	

[View All](#)

10. Click the **Living Unit Number** hyperlink.

Details **Living Units** Facility History

Living Units (1) [Settings] [Refresh]

1 item • Sorted by Living Unit Number • Updated a few seconds ago

	Living Unit Number ↓	Total Number of Children ↓
1	LU-0000016	6

[View All](#)

The **Living Units Details** screen displays, defaulting to the Details tab.

Details Living Unit History

Information

Living Unit Number: LU-0000016
 Facility: [Test Facility](#)
 Living Unit Name:
 Unit Name:

Activity

Filters: All time • All activities • All types [Settings]

[Refresh](#) • [Expand All](#) • [View All](#)

Upcoming & Overdue

No activities to show.

11. Review the Details tab.

Details Living Unit History

Information

Living Unit Number: LU-0000016
 Facility: [Test Facility](#)
 Living Unit Name:
 Unit Name:

Living Unit Description

Gender of Children: Both Male/Female
 Total Number of Children: 6

▼ Age Range

From Age Years	To Age Years
5	17
From Age Months	To Age Months
5	12

▼ SACWIS Information

Agency SACWIS Provider Id

▼ System Information

Created By	Last Modified By
James Dean , 11/21/2024 9:35 AM	James Dean , 11/21/2024 9:35 AM

12. When done reviewing the Details tab, click the **Living Unit History** tab.

The **Living Unit History** screen displays.

Details

Living Unit History

Living Unit History (2)

Date	Field	User	Original Value	New Value
11/21/2024 9:35 AM	Created.	James Dean		
11/21/2024 9:35 AM	Provider Effective Date	James Dean		11/21/2024

[View All](#)

13. When done reviewing the Living Units, click the **Application Number** to return to the **Branches and Facilities** tab.

☰

Ohio Certification f...

Agency Applications ▼

APP-000028 | Agenc... ▼ x

APP-000029 | Agenc... ▼ x

APP-000029 | Ag...

Testing Br... ▼ x

Test Facilit... ▼ x

LU-0000... ▼ x

Living Unit
LU-0000016

Printable View

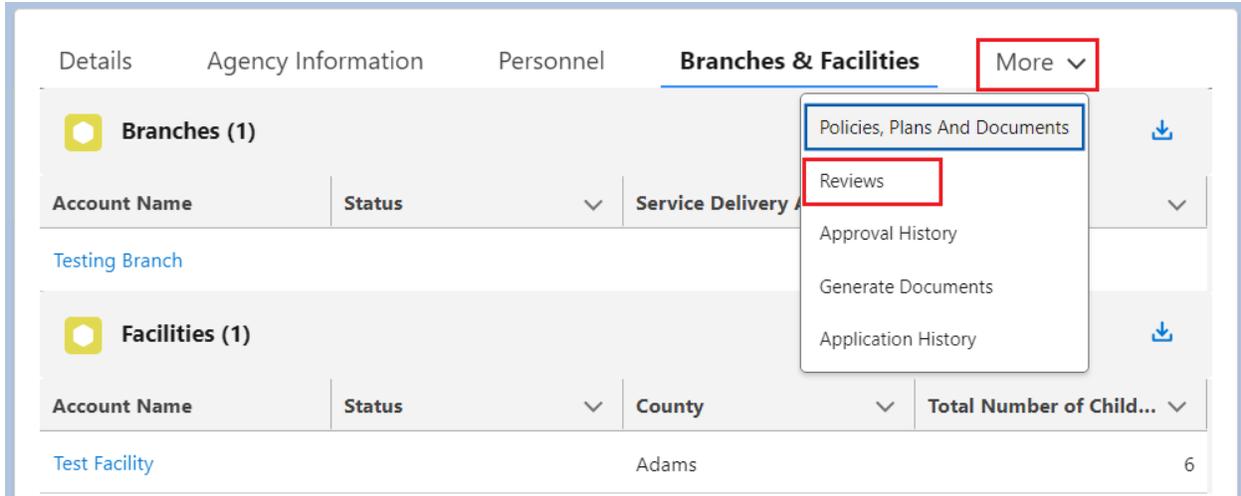
Details
Living Unit History

Activity

The **Branches and Facilities** tab displays.

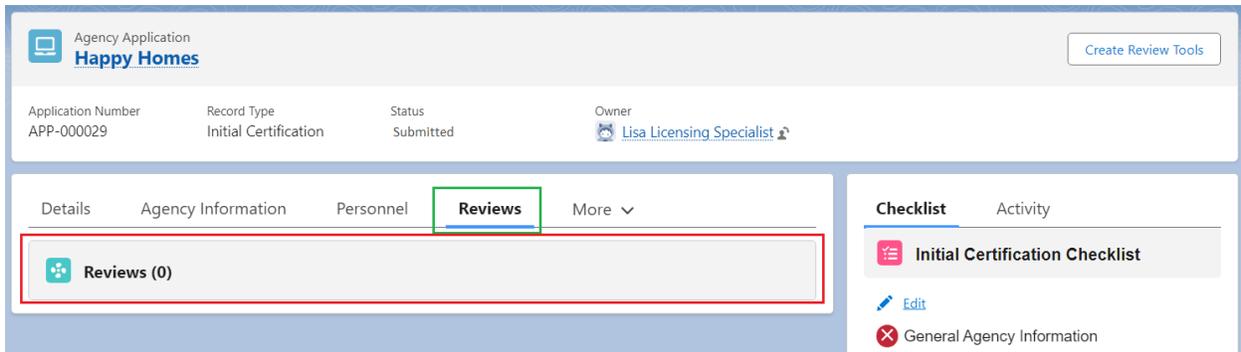
Reviews

1. Click the **More** tab.
2. Select **Reviews** from the dropdown menu.



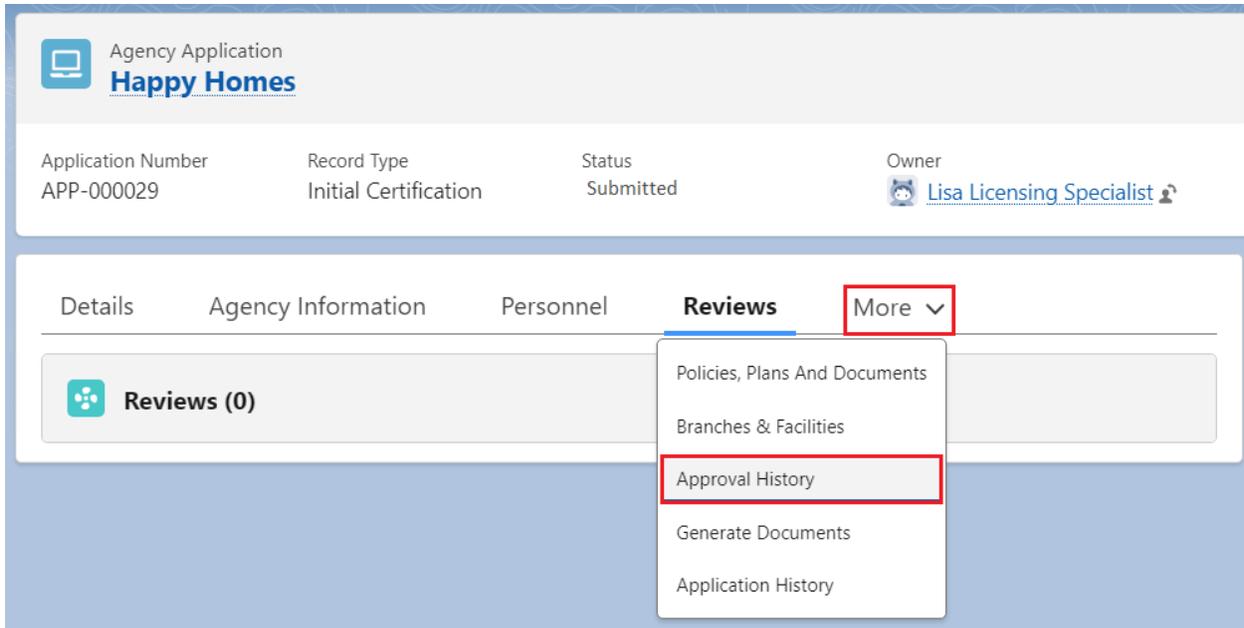
The **Reviews** tab displays.

Note: Since this is a new initial application, no reviews have been completed. Once a review is completed, it will display here.



Approval History

1. Click the **More** tab.
2. Select **Approval History** from the dropdown menu.



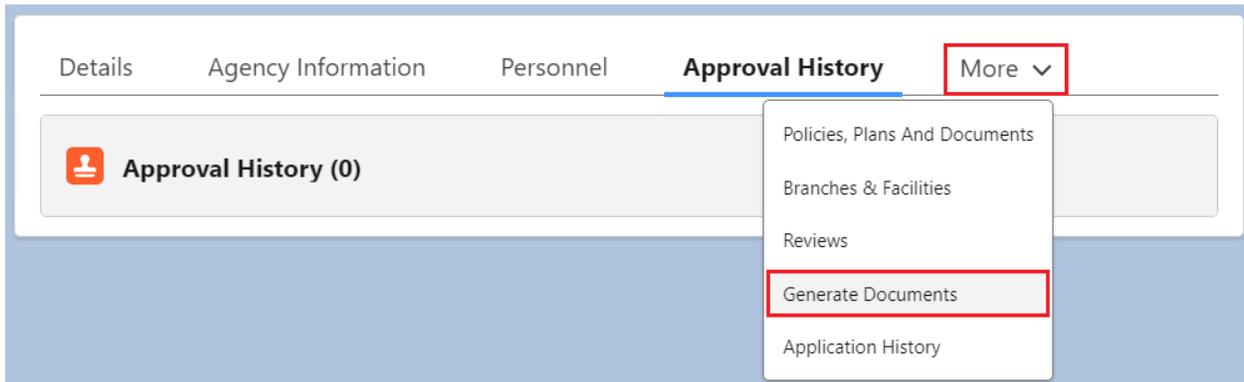
The **Approval History** screen displays.

Note: Since this a new initial application, no Approval History exists for this agency. Once approved, the history will display here.



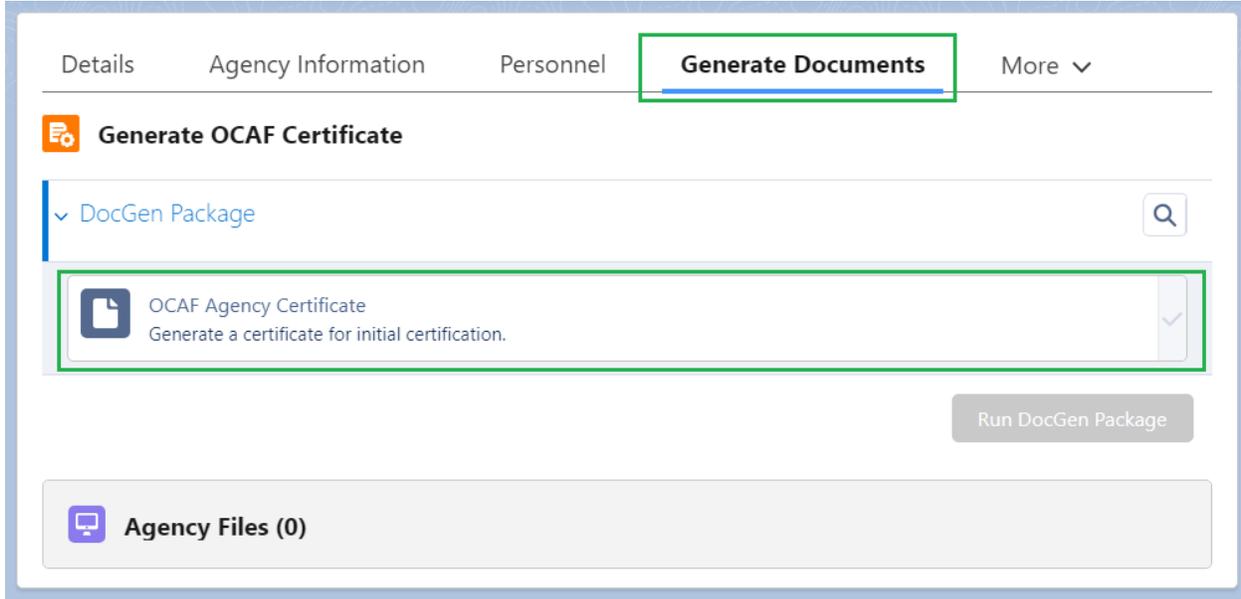
Generate Documents

1. Click the **More** tab.
2. Select **Generate Documents** from the dropdown menu.



The **Generate Documents** screen displays.

Note: Here is where the Licensing Specialist will generate the **Certificate for Initial Certification**. Since this is an initial review of the application, the certificate will not be generated yet.



Application History

1. Click the **More** tab.
2. Select **Application History** from the dropdown menu.



The **Application History** screen displays.

Details Agency Information Personnel **Application History** More ▾

Agency Application History (6+)

Date	Field	User	Original Value	New Value
12/3/2024 10:43 AM	Status	George Dean	In Progress	Submitted
12/3/2024 10:43 AM	Most Recent Submitt...	George Dean		12/3/2024, 10:43 AM
12/3/2024 10:43 AM	Submittal Count	George Dean		1
12/3/2024 10:43 AM	Initial Submittal Date...	George Dean		12/3/2024, 10:43 AM
12/3/2024 10:43 AM	Board President Sign...	George Dean		

3. When done reviewing the Application History tab, click the **Details** tab.

Details Agency Information Personnel **Application History** More ▾

Agency Application History (6+)

Date	Field	User	Original Value	New Value
12/3/2024 10:43 AM	Status	George Dean	In Progress	Submitted
12/3/2024 10:43 AM	Most Recent Submitt...	George Dean		12/3/2024, 10:43 AM
12/3/2024 10:43 AM	Submittal Count	George Dean		1
12/3/2024 10:43 AM	Initial Submittal Date...	George Dean		12/3/2024, 10:43 AM
12/3/2024 10:43 AM	Board President Sign...	George Dean		

Checklist Activity

Initial Certification Checklist

[Edit](#)

- General Agency Information

Initial Certification Checklist

Once the Initial Application for Certification has been reviewed by a Licensing Specialist, they may utilize the Initial Certification Checklist tool to verify they have reviewed all portions of the application. Shown in green below:

Details Agency Information Personnel Policies, Plans And Documents More ▾

Application Information

Record Type: Initial Certification Status: Submitted

Application Number: APP-000029 Owner: Lisa Licensing Specialist

Is this an adoption agency? Completed Date

Return Reasons

Submission Information

Initial Submittal Date/Time: 12/3/2024 10:43 AM Submittal Count: 1

Most Recent Submittal Date/Time: 12/3/2024 10:43 AM

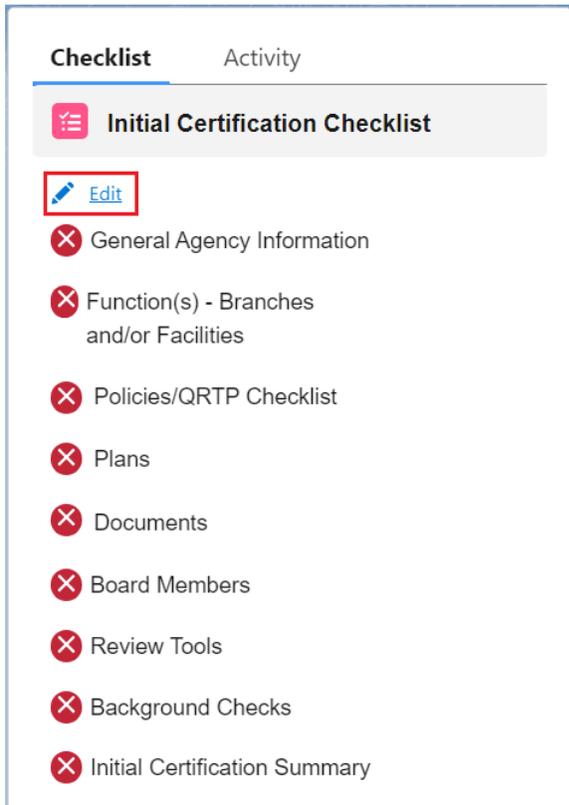
Checklist Activity

Initial Certification Checklist

[Edit](#)

- General Agency Information
- Function(s) - Branches and/or Facilities
- Policies/QRTP Checklist
- Plans
- Documents
- Board Members
- Review Tools
- Background Checks
- Initial Certification Summary

1. Click the **Edit** button.



The Checklist displays a **Yes or No** option under each section.

2. Update each section to **Yes** if the Licensing Specialist reviewed the entire Initial Application.
3. Click **Save** when complete.

Checklist Activity

Initial Certification Checklist

[Save](#)

- General Agency Information
Has this section been reviewed?
 Yes No
- Function(s) - Branches and/or Facilities
Has this section been reviewed?
 Yes No
- Policies/QRTP Checklist
- Plans
- Documents
- Board Members
Has this section been reviewed?
 Yes No
- Review Tools
Has this section been reviewed?
 Yes No
- Background Checks
Has this section been reviewed?
 Yes No
- Initial Certification Summary
Has this section been reviewed?
 Yes No

The **Initial Certification Checklist** now shows green checkmarks.

Checklist Activity

Initial Certification Checklist

[Edit](#)

- General Agency Information
- Function(s) - Branches and/or Facilities
- Policies/QRTP Checklist
- Plans
- Documents
- Board Members
- Review Tools
- Background Checks
- Initial Certification Summary

Application Status

After the Initial Application for Certification has been reviewed by a Licensing Specialist, the Status can be changed to **Application Accepted**.

From the **Application Details** screen:

1. Click the **Edit** icon for **Status**.

The screenshot shows the 'Agency Application' details for 'Happy Homes'. The application number is APP-000029, the record type is 'Initial Certification', and the status is 'Submitted'. The owner is 'Lisa Licensing Specialist'. The 'Details' tab is active, and the 'Application Information' section is expanded. The 'Status' field is highlighted with a red box, and an edit icon is visible next to it. On the right, the 'Checklist' section shows 'Initial Certification Checklist' with several items marked as complete.

2. Select **Application Accepted** from the dropdown menu.
3. Click the **Save** button.

The screenshot shows the 'Agency Application' details for 'Happy Homes' with the status field updated to 'Application Accepted'. The 'Status' field is highlighted with a red box. The 'Save' button at the bottom right is also highlighted with a red box. The 'Application Information' section is expanded, and the 'Return Reasons' field is visible.

The Status now shows as **Application Accepted**.

OCAF Initial Certification Application Initial Review – Licensing Specialist

The screenshot shows a web interface for an agency application. At the top, it identifies the agency as 'Happy Homes' under 'Agency Application'. Below this, a summary row displays: Application Number (APP-000029), Record Type (Initial Certification), Status (Application Accepted), and Owner (Lisa Licensing Specialist). A green box highlights the 'Status' field in both the summary row and the 'Application Information' section below. The 'Application Information' section includes fields for Record Type, Application Number, a checkbox for 'Is this an adoption agency?', and 'Return Reasons'. The 'Status' field in this section also shows 'Application Accepted' and is highlighted with a green box. The interface includes navigation tabs for 'Details', 'Agency Information', 'Personnel', 'Policies, Plans And Documents', and 'More'.

The next step in the application process is processing **Review Tools**. Please refer to this User Guide for further guidance.

[SACWIS Knowledge Base - OCAF Review Tools Certification Application Licensing Specialist](#)

[SACWIS Knowledge Base - Certification Application Supervisor Review Tools](#)

If you have additional questions pertaining to this Deployment Communication, please contact the [Customer Care Center](#).