

Knowledge Base Article

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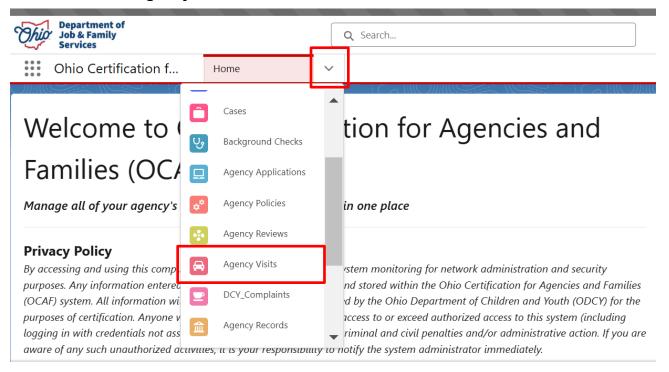
Overview

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.
- Select the Agency Visits value from the list.

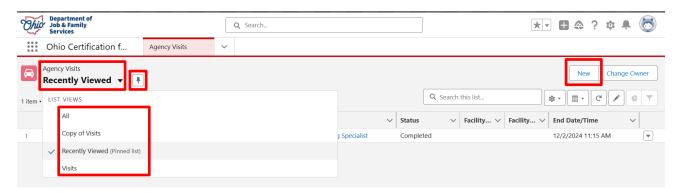


The Agency Visits section will appear.

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- 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

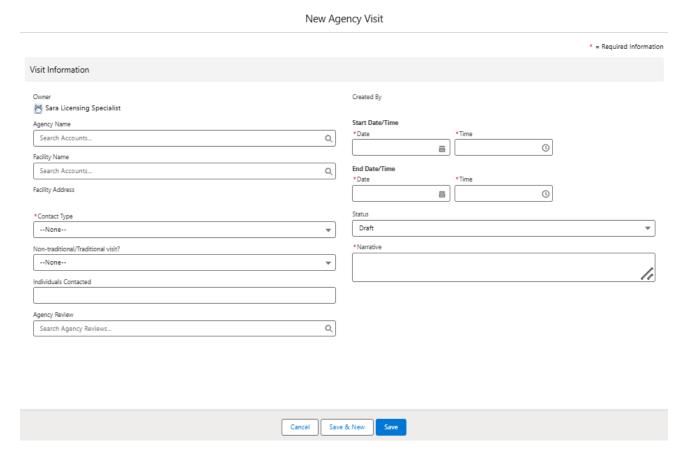
All fields marked with a red asterisk (*) will be required.

- 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.



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.

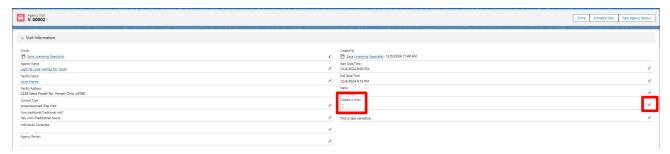




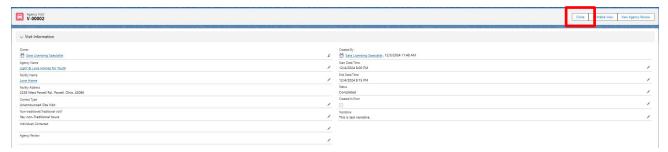
3. To mark an **Agency Visits** record in **Completed** status as **Created in Error**, click on the record number hyperlink, click the pencil icon next to the question and check the **Created in Error** box found on the inside of the Visit Information screen.

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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.



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.
- 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).



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 <u>Customer Care Center</u>.



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