

# **Navigating Through the Provider Overview Screen**



**Knowledge Base Article**

# Navigating Through the Provider Overview Screen

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## Navigating Through the Provider Overview Screen

### Overview

This article reviews each tab on the side navigation bar within a Provider Case. Complete the following steps to navigate through the **Provider Overview** screen.

### Navigating to the Provider Overview Screen

1. From the Ohio SACWIS **Home** screen, click the **Provider** tab.
2. Click **Provider Search** tab.

The **Provider Profile Search Criteria** screen appears.

3. On the **Provider Search** tab, enter the appropriate search criteria into the fields as needed. Some fields will automatically default with information.

# Navigating Through the Provider Overview Screen

Home Intake Case **Provider** Financial Administration

Workload **Provider Search** Provider Match Recruitment Inquiry Training Contracts Agency Certifications KCCP Pre-Screening Tool

Search For Provider Profile

Provider ID:

OR

Provider Name:  Member Last Name:  Member First Name:  Member Middle Name:

Provider Category:

Agency Type:

Agency:

Provider Type:   Include "Closed" Provider Type Status

Provider Status:

[Address, Contact and Provider Reference Criteria](#)

Name Match Precision  
Returns results matching entered names including AKA names/nicknames

+ AKA/Nicknames

[Fewer Results](#) [More Results](#)

4. Click the **Search** button.

The search results appear in the **Provider Profile Search Results** grid at the bottom of the **Provider Search** tab.

Search Results

Result(s) 1 to 1 of 1 / Page 1 of 1

|                      | Provider Name / ID     | Provider Status | Provider Category | Address |
|----------------------|------------------------|-----------------|-------------------|---------|
| <a href="#">view</a> | Test, Provide / 121212 | ACTIVE          | HOME              |         |

[View Provider Type Information](#)

5. Click the **Edit** link in the appropriate row.

The **Provider Overview** screen for the selected provider appears.

# Navigating Through the Provider Overview Screen

## Viewing Provider Basic Information

This section discusses the Provider Information listed on the Provider Overview screen.

## Viewing Provider Information

1. To view Provider Information, click the **Provider Information** link on the Overview screen.

The screenshot displays the Provider Overview interface. On the left is a vertical navigation menu with the following items: **Provider Overview** (highlighted with a green box), Activity Log, Inquiries, KPIP History, KCCP Pre-Screening Tool, Forms/Notices, Skills, Training, Acceptance Criteria, Description of Home, Description of Family, Foster to Adopt (1692) Home, and Study. The main content area is divided into several sections: 1. Provider Name / ID: Test, Provider / 123456; Category / Status: Home / Active. 2. Primary Address: 123 Test Rd Test Oh 12345; Primary Contact: Email: [redacted]. 3. Provider Actions: A blue bar containing a green box around the text 'Provider Actions'. 4. Provider Information: A red box around the text 'Provider Information', followed by links for 'Linked 1692 Providers' and 'Associated Providers'. 5. Approval/Certification Spans: A blue bar at the bottom.

The Provider Information screen displays, faulting to the Basic tab.

# Navigating Through the Provider Overview Screen

Provider / Workload / Provider Information

## Manage Provider Details

PROVIDER NAME / ID: Test, Provider / 123456

CATEGORY: Residential

Basic

Address

Members

Capacity

### Provider Name Information

| Provider Name  | Effective Date | End Date |
|----------------|----------------|----------|
| Test, Provider | 08/05/2020     |          |

### Provider Type Information

Closed Type Status:

Exclude  Include

Foster to Adopt (1692):

Exclude  Include

### Provider Status Information

[View Status History](#)

| Provider Status             | Reason | Status Effective Date |
|-----------------------------|--------|-----------------------|
| <a href="#">view</a> Active |        | 08/05/2020            |

### Provider Suspension Information

[View Suspension History](#)

| Provider Type                | Suspension Effective Date | Suspension End Date | Reasons | Options Narrative |
|------------------------------|---------------------------|---------------------|---------|-------------------|
| <a href="#">view</a> Example | 12/08/2014                |                     | Other   |                   |

### Provider Reference Information

| Reference Type | Reference Number | Description |
|----------------|------------------|-------------|
|----------------|------------------|-------------|

### Provider Tax Identification Number (TIN) Information

Tax Identification Number (TIN) does not exist for the selected provider.

Apply

Save

Cancel

- The user can click **View** on any of the available view history links. For example, click **View** under the Provider Suspension Information section.

# Navigating Through the Provider Overview Screen

**Provider Status Information** [View Status History](#)

| Provider Status             | Reason | Status Effective Date |
|-----------------------------|--------|-----------------------|
| <a href="#">view</a> Active |        | 07/08/2005            |

**Provider Suspension Information** [View Suspension History](#)

| Provider Type                | Suspension Effective Date | Suspension End Date | Reasons | Options Narrative |
|------------------------------|---------------------------|---------------------|---------|-------------------|
| <a href="#">view</a> Example | 12/08/2014                |                     | Other   |                   |

**Note:** The user can view history information by selecting the View Suspension History link.

The Provider Suspension Information screen displays.

3. Click **Cancel** or **Ok** to exit.

**Provider Suspension Information**

Provider Type  
Example Provider Type

Effective Date  
MM/DD/YYYY

End Date  
MM/DD/YYYY

Reason for Suspension  
Option 1; Other

Other Reason:  
Testing Other Reasons

Created in Error:  
No

[Cancel](#) [OK](#)

The user is returned to the Provider Information screen, defaulted to the Basic tab. The user can navigate to the other Tabs listed to view additional information on the Provider by selecting the desired tab.

Basic | Address | Members | Capacity

**Provider Name Information**

| Provider Name | Effective Date | End Date |
|---------------|----------------|----------|
|---------------|----------------|----------|

**Note:** If a Provider is Suspended, a badge will display on the Overview screen:

# Navigating Through the Provider Overview Screen

The screenshot shows the top navigation bar with tabs: Home, Intake, Case, **Provider**, Financial, and Administration. Below this is a secondary navigation bar with links: Workload, **Provider Search**, Provider Match, Recruitment, Inquiry, Contracts, Agency Certifications, and KCCP Pre-Screening Tool. On the left is a navigation menu with links: **Provider Overview**, Activity Log, Inquiries, KPIP History, KCCP Pre-Screening, Forms/Notices, Skills, and Training. The main content area displays provider information: PROVIDER NAME / ID: Test, Provider / 123456; CATEGORY / STATUS: Residential / Active (with a red 'Suspended' tag); ADDRESS: 123 Test Rd, Test Oh 12345; PRIMARY CONTACT: Other Phone: [redacted]. Below this is a 'Provider Actions' section with links for Provider Information and Linked 1692 Providers.

## Viewing Information from the Navigation Menu

This section discusses each link in the left-hand **Navigation** menu.

**Note:** The links that display in the **Navigation** menu are based on security. Some of the links discussed below may not display in your **Navigation** menu.

## Viewing History Information

If a home is currently **Approved / Certified**, the current Foster Care and Adoption information will display in the **Foster/Adoptive Spans** grid on the **Provider Overview** screen.

This screenshot shows the same navigation menu as above, but the main content area displays 'Approval/Certification Spans' for a provider with ID 121212 (Tier 3, Home / Active). The spans are shown in a table:

| Provider Type | Level of Care         | Approval/Certification Period | Agency      | Certifying Entity |
|---------------|-----------------------|-------------------------------|-------------|-------------------|
| Foster Care   | Treatment Foster Home | 07/01/2023 - 06/30/2025       | The Village | ODJFS             |
| Adoptive Care |                       | 07/01/2023 - 06/30/2025       | The Village | ODJFS             |

Below the table is a 'View History' link highlighted with a red box.

1. To view the history, click the **View History** link.

# Navigating Through the Provider Overview Screen

The **Approval/Certification Information** screen appears displaying the history.

| Provider Type | Level of Care | Approval/Certification Period | Agency      | Certifying Entity |
|---------------|---------------|-------------------------------|-------------|-------------------|
| Adoptive Care |               | 07/01/2021 - 06/30/2023       | The Village | ODJFS             |
| Foster Care   | Treatment     | 07/01/2021 - 06/30/2023       | The Village | ODJFS             |
| Adoptive Care |               | 07/01/2019 - 06/30/2021       | The Village | ODJFS             |

[Close](#)

2. When complete, click the **Close** button to return to the **Provider Overview** screen.

## Viewing Activity Logs

1. To view Activity Logs, click the **Activity Log** link in the **Navigation** menu.

The **Activity Log Filter Criteria** screen appears displaying the **Activity Log** section below it.

The screenshot shows the 'Provider Overview' navigation menu on the left with 'Activity Log' highlighted. The main content area displays the 'Activity Log Filter Criteria' form for provider 'Sacwis, Susie / 121212'. The form includes fields for 'Activity From Date', 'Activity To Date', 'Responsible Worker', 'Contact Type', 'Category', 'Sub-Category', 'Created By', and 'Activity State'. Below the form are 'Filter' and 'Clear Form' buttons. The 'Activity Log' section shows a table with one entry for '06/06/2023' with a 'view' link highlighted. The entry details include 'Face-to-Face Visit with Provider(s)', 'Foster/Adoptive Home Applicant', 'Assessment Visit', 'Test, Worker', and 'Completed' status. Associated participants are listed as 'Test, Adult'.

**Note:** You can enter criteria in the desired **Filter Criteria** fields and click the **Filter** button to filter the **Activity Log** list.

2. Click the **View** link in the appropriate row.

# Navigating Through the Provider Overview Screen

**Note:** Please refer to the [Recording an Activity Log on a Provider Record](#) Knowledge Base article for additional information.

## Viewing Inquiries

1. To view Inquiries, click the **Inquiries** link in the **Navigation** menu.

The **Inquiries** screen appears displaying the **Linked Inquiries** tab.

The screenshot shows the 'Inquiries' screen with the 'Linked Inquiries' tab selected. The left navigation menu has 'Inquiries' highlighted. The main content area shows a table of linked inquiries for provider 'Sacwis, Susie / 121212'.

| Inquiry ID           | Inquirer 1     | Inquiry Date | Provider Type        | Inquiry Worker | Agency  |
|----------------------|----------------|--------------|----------------------|----------------|---|
| <a href="#">view</a> | Test, Provider | 05/22/2011   | Foster Care/Adoption | Worker         | The Village                                       |
| <a href="#">view</a> | Test, Provider | 05/22/2011   | Foster Care/Adoption | Worker         | The Village                                       |
| <a href="#">view</a> | Test, Provider | 04/22/2002   | Adoption             | Worker         | Test County Department of Job and Family Services |
| <a href="#">view</a> | Test, Provider | 04/22/2002   | Foster Care          | Worker         | Test County Department of Job and Family Services |
| <a href="#">view</a> | Test, Provider | 04/22/2002   | Adoption             | Worker         | Test County Department of Job and Family Services |

2. Click the **View** link in the appropriate row.
3. When complete, click the **Close** button to return to the **Inquiries** screen.
4. To view Associated Inquiries, click the **Associated Inquiries** tab.

The **Associated Inquiries Filter Criteria** screen appears displaying the **Associated Inquiries with Current Members** section below it.

The screenshot shows the 'Associated Inquiries' tab selected. It features a filter criteria section with dropdown menus for Agency Type, Reason for Inquiry, Current Member Name, and Provider Type. Below the filters is a table of associated inquiries with current members.

| Inquiry ID           | Inquirer 1     | Inquiry Date | Reason for Inquiry | Provider Type        | Inquiry Worker | Agency  |
|----------------------|----------------|--------------|--------------------|----------------------|----------------|---|
| <a href="#">view</a> | Test, Provider | 07/26/2022   | Provider Interest  | Foster Care          | Worker         | The Village                                       |
| <a href="#">view</a> | Test, Provider | 05/22/2011   | Provider Interest  | Foster Care/Adoption | Worker         | The Village                                       |
| <a href="#">view</a> | Test, Provider | 05/22/2011   | Provider Interest  | Foster Care/Adoption | Worker         | The Village                                       |
| <a href="#">view</a> | Test, Provider | 04/22/2002   | Provider Interest  | Adoption             | Worker         | Test County Department of Job and Family Services |
| <a href="#">view</a> | Test, Provider | 04/22/2002   | Provider Interest  | Foster Care          | Worker         | Test County Department of Job and Family Services |
| <a href="#">view</a> | Test, Provider | 04/22/2002   | Child of Interest  | Adoption             | Worker         | Test County Department of Job and Family Services |

## Navigating Through the Provider Overview Screen

**Note:** You can select criteria in the desired **Filter Criteria** fields and click the **Filter** button to filter the **Associated Inquiries with Current Members** list.

5. Click the **View** link in the appropriate row.
6. When complete, click the **Close** button to return to the **Inquiries** screen.

**Note:** Please refer to the [Creating a Provider Record from a Provider Inquiry](#) Knowledge Base article for more information.

### Viewing KPIP History

1. To view **KPIP History**, click the **KPIP History** link in the **Navigation** menu.



The Kinship Applications screen appears. If any KPIP Applications have been submitted, they will appear here.

### Viewing KCCP Pre-Screening Tool

1. To view **KCCP Pre-Screen Tools**, click the **KCCP Pre-Screening Tools** link in the **Navigation** menu.

The **KCCP Pre-Screening Tools** screen appears.



The **KCCP Pre-Screening Tools** will appear for **Kinship Care Providers**.

### Viewing Forms/Notices

1. To view Forms and Notices, click the **Forms/Notices** link in the **Navigation** menu.

## Navigating Through the Provider Overview Screen

The **Maintain Forms/Notices** screen appears. The **Forms/Notices** drop-down list will display forms/notices related to the provider (if applicable).

2. Select the desired document in the **Forms/Notices** drop-down list.



The screenshot shows the 'Maintain Forms/Notices' interface. On the left, a navigation menu includes 'Inquiries', 'KPIP History', 'KCCP Pre-Screening Tool', 'Forms/Notices' (highlighted with a red box), and 'Skills'. The main content area has a header 'Maintain Forms/Notices' and a dropdown menu labeled 'Forms/Notices:' with a downward arrow. Below the dropdown is a blue 'Select' button, also highlighted with a red box.

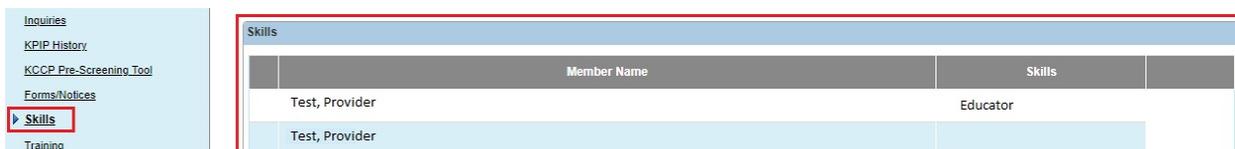
3. Click the **Select** button to display the **Document Details** screen and generate the document.

## Viewing Skills

1. To view Skills, click the **Skills** link in the **Navigation** menu.

The **Skills** screen appears displaying any recorded skills.

2. Click the **View**, **Edit**, or **Add Skills** links as appropriate.



The screenshot shows the 'Skills' interface. On the left, a navigation menu includes 'Inquiries', 'KPIP History', 'KCCP Pre-Screening Tool', 'Forms/Notices', 'Skills' (highlighted with a red box), and 'Training'. The main content area has a header 'Skills' and a table with two columns: 'Member Name' and 'Skills'.

| Member Name    | Skills   |
|----------------|----------|
| Test, Provider | Educator |
| Test, Provider |          |

The skills are viewed, edited, or added.

# Navigating Through the Provider Overview Screen

## Viewing Training

1. To view Training, click the **Training** link in the **Navigation** menu.

The **Completed Training List** screen appears.

**Navigation Menu:**

- Inquiries
- KPIP History
- KCCP Pre-Screening Tool
- Forms/Notices
- Skills
- Training**
- Acceptance Criteria
- Description of Home
- Description of Family
- Foster to Adopt / 1692) Home Study
- Home Study
- Approval/Certification
- Kinship Assessment
- Large Family Assessment
- Contracts
- Service Credentials
- Placements/Services
- Intake Reports
- Complaints/Rule Violations
- Waiver
- Potential Matches
- AP Search History
- Living Arrangement

**Completed Training List**

| Member Name / Person ID | Training Type | Level of Care    | Session Name / ID                  | Instructor Name    | Session Date | Delivery Method | Location     | Actual Hours | Apply Hours to Certification |
|-------------------------|---------------|------------------|------------------------------------|--------------------|--------------|-----------------|--------------|--------------|------------------------------|
| Test, Provider          | Continuing    | Treatment Foster | Adult Pediatric First Aid/ CPR AED | American Red Cross | 04/16/2023   | Classroom       | Other Agency | 4            | Yes                          |

Training Competencies: CPR & First Aid

2. When complete, click the **Close** button.

# Navigating Through the Provider Overview Screen

## Viewing Acceptance Criteria

1. To view Acceptance Criteria, click the **Acceptance Criteria** link in the **Navigation** menu.

**Important:** You will enter the acceptance characteristics from the **JFS 1673A** form on this screen.

The **Acceptance Characteristics List** screen appears.

|                      | Provider Type | Effective Date | End Date   | Status                         | Created Date |                        |
|----------------------|---------------|----------------|------------|--------------------------------|--------------|------------------------|
| <a href="#">view</a> | Foster Care   | 05/21/2012     | 07/31/2017 | Linked To Completed Home Study | 05/21/2012   | <a href="#">report</a> |
| <a href="#">view</a> | Adoptive Care | 08/19/2002     | 09/01/2008 | Linked To Completed Home Study | 08/23/2006   | <a href="#">report</a> |

2. Click the **View** link in the appropriate row.
3. To view placement criteria, click the **Usage Placement Criteria** tab.

The **Usage Placement Criteria** screen appears.

|                      | Provider Type | Effective Date | End Date   | Status                         | Created Date |
|----------------------|---------------|----------------|------------|--------------------------------|--------------|
| <a href="#">view</a> | Foster Care   | 11/09/2007     | 08/07/2008 | Linked To Completed Home Study | 11/08/2007   |
| <a href="#">view</a> | Foster Care   | 08/08/2008     | 01/25/2010 | Linked To Completed Home Study | 08/08/2008   |

4. Click the **View** link in the appropriate row.

**Note:** Please refer to the [Recording Child Acceptance Characteristics and Usage Criteria](#) Knowledge Base article for additional information.

## Navigating Through the Provider Overview Screen

### Viewing Description of Home

1. To view the description of the home, click the **Description of Home** link in the **Navigation** menu.

The **Description of Home History** screen appears.

| Description of Home History |              |                |            |                                |
|-----------------------------|--------------|----------------|------------|--------------------------------|
|                             | Address      | Effective Date | End Date   | Status                         |
| <a href="#">view</a>        | Test Address | 08/19/2002     | 09/10/2007 | Linked to Completed Home Study |
| <a href="#">view</a>        | Test Address | 09/10/2007     | 08/06/2008 | Linked to Completed Home Study |

2. Click the **View** link in the appropriate row.
3. To add a description, click the **Add Description of Home** button.

### Viewing Description of Family

1. To view the description of the family, click the **Description of Family** link in the **Navigation** menu.

The **Maintain Description of Family** screen appears.

| Maintain Description of Family        |                |            |   |                                |
|---------------------------------------|----------------|------------|---|--------------------------------|
| Result(s) 1 to 14 of 14 / Page 1 of 1 |                |            |   |                                |
| Type                                  | Effective Date | CreatedBy  | Agency  | Status                         |
| Initial                               | 08/19/2002     | Conversion | Test County Department of Job and Family Services | Linked to Completed Home Study |
| Initial                               | 08/29/2006     | Conversion | Test County Department of Job and Family Services | Linked to Completed Home Study |

**Note:** Please reference the [Completing a Review Description of Family \(DOF\)](#) Knowledge Base article for additional information.

# Navigating Through the Provider Overview Screen

## Viewing Foster to Adopt (1692) Home Study

1. To view Foster to Adopt (1692) Home Study information, click the **Foster to Adopt (1692) Home Study** link in the **Navigation** menu.

The **Home Study Filter Criteria** screen appears displaying the **Maintain Home Study History** grid below it.

The screenshot shows a navigation menu on the left with the following items: Skills, Training, Acceptance Criteria, Description of Home, Description of Family, Foster to Adopt (1692) Home Study (highlighted with a red box), and Home Study. To the right is the 'Maintain Home Study History' grid with the following data:

| Child Name                       | Application Received Date | Recommendation | Status                   | Decision Effective Date | Agency | Letter Sent |
|----------------------------------|---------------------------|----------------|--------------------------|-------------------------|--------|-------------|
| <a href="#">view</a> Test, Child | 10/11/2023                | Approved       | <a href="#">Approved</a> | 10/11/2023              |        |             |

2. Click the **View** or **Edit** links as appropriate.

**Note:** Please refer to the [Completing a Foster to Adopt \(1692\) Home Study](#) Knowledge Base article for additional information.

## Viewing Home Study

1. To view home study information, click the **Home Study** link in the **Navigation** menu.

The **Home Study Filter Criteria** screen appears displaying the **Maintain Home Study History** section below it.

The screenshot shows a navigation menu on the left with the following items: Description of Family, Foster to Adopt (1692) Home Study, Home Study (highlighted with a red box), Approval/Certification, Kinship Assessment, Large Family Assessment, Contracts, and Service Credentials. To the right is the 'Maintain Home Study History' grid with the following data:

| Provider Type | Home Study Type  | Start Date | Status                   | Recommendation | Recommendation Date | Agency      |
|---------------|------------------|------------|--------------------------|----------------|---------------------|-------------|
| Adoptive Care | Recertify/Update | 05/18/2023 | <a href="#">Approved</a> | Approve        | 06/27/2023          | The Village |
| Adoptive Care | Recertify/Update | 06/07/2021 | <a href="#">Approved</a> | Approve        | 06/28/2021          | The Village |

**Note:** You can enter criteria in the desired **Filter Criteria** fields and click the **Filter** button to filter the **Maintain Home Study History** list.

**Note:** Please refer to the [Completing a Foster Care or Adoption Initial Home Study](#) Knowledge Base article for additional information.

# Navigating Through the Provider Overview Screen

## Viewing Approvals and Certifications

1. To view approvals and certifications, click the **Approval/Certification** link in the **Navigation** menu.

The **Maintain Approval/Certification Recommendations** screen appears displaying all transactions entered on the Provider record as related to the foster care certification / adoption approval.

|                             | Provider Type | Transaction Type | Status                   | Recommending Agency | Effective Date | Expiration Date |
|-----------------------------|---------------|------------------|--------------------------|---------------------|----------------|-----------------|
| <a href="#">view report</a> | Adoptive Care | Reapproval       | <a href="#">Approved</a> | The Village         | 07/01/2023     | 06/30/2025      |
| <a href="#">view report</a> | Adoptive Care | Reapproval       | <a href="#">Approved</a> | The Village         | 07/01/2021     | 06/30/2023      |
| <a href="#">view report</a> | Adoptive Care | Reapproval       | <a href="#">Approved</a> | The Village         | 07/01/2019     | 06/30/2021      |

2. Click the **View** link in the appropriate row.
3. To add a recommendation, click the **Add Recommendation** button.

## Viewing Kinship Assessment

1. To view a **Kinship Assessment**, click the **Kinship Assessment** in the **Navigation** menu.

The **Kinship Assessments** screen appears.

| Child Name | Assessment Type - Date | Provider Types | Status | Recommendation - Date | Letter Sent | Agency |
|------------|------------------------|----------------|--------|-----------------------|-------------|--------|
|------------|------------------------|----------------|--------|-----------------------|-------------|--------|

Any **Kinship Assessments** completed will appear in the grid.

## Navigating Through the Provider Overview Screen

### Viewing Large Family Assessment

1. To view **Large Family Assessment**, click the **Large Family Assessment** link in the **Navigation** menu.

The **Large Family Assessment History** screen appears.

The screenshot shows the 'Large Family Assessment History' screen. On the left, a navigation menu lists various options, with 'Large Family Assessment' highlighted. The main content area has a blue header 'Large Family Assessment History' and a message: 'No Large Family Assessments exist for this Provider.' Below this message is a button labeled 'Add Large Family Assessment'.

2. Click the **Add Large Family Assessment** button to add an Assessment.

### Viewing Contracts

1. To view contracts, click the **Contracts** link in the **Navigation** menu.

The **Contracts Filter Criteria** screen appears displaying the **Contracts** grid below it.

The screenshot shows the 'Contracts Filter Criteria' screen. On the left, a navigation menu lists various options, with 'Contracts' highlighted. The main content area has a blue header 'Contracts' and a message: 'Result(s) 0 / Page 0 of 0'. Below this message is a table with the following columns: Agency, Contract Type, Bridges Grantee, Contract Number, Status, Contract Begin, and Contract End. The table is empty, and a message 'No Results Returned.' is displayed. Below the table is a button labeled 'Add Contract'.

**Note:** You can enter criteria in the desired **Filter Criteria** fields and click the **Filter** button to filter the **Contracts** list.

## Navigating Through the Provider Overview Screen

2. Click the **View** or **Edit** links as appropriate.
3. To add a contract, click the **Add Contract** button.

**Note:** Please refer to the [Creating a Contract](#) Knowledge Base article for additional information.

### Viewing Service Credentials

1. To view service credentials, click the **Service Credentials** link in the **Navigation** menu.

The **ODJFS Approved Services Filter Criteria** screen appears displaying the **ODJFS Approved Services** tab below it.

| ODJFS Approved Services              |                            |                  |                        |                                    |                |                |  |                        |
|--------------------------------------|----------------------------|------------------|------------------------|------------------------------------|----------------|----------------|--|------------------------|
| Result(s) 1 to 5 of 41 / Page 1 of 9 |                            |                  |                        |                                    |                |                |  |                        |
|                                      |                            | Service Category | Service Type           | Service Description                | Service Status | Effective Date | Agency                                     |                        |
| <a href="#">view history</a>         | <a href="#">deactivate</a> | Placement        | Family Foster Home     | Family Foster                      | ACTIVE         | 07/01/2009     | The Village                                | <a href="#">delete</a> |
| <a href="#">view history</a>         | <a href="#">deactivate</a> | Placement        | Approved Adoptive Home | Adoptive Placement - Accessibility | ACTIVE         | 11/27/2012     | Ohio Department of Job and Family Services | <a href="#">delete</a> |

**Note:** You can enter criteria in the desired **Filter Criteria** fields and click the **Filter** button to filter the **ODJFS Approved Services** list.

2. Click the **View History** or **Deactivate** links as appropriate.
3. To view other service credentials for the provider, click the **Other Services** tab.

The **Other Services Filter Criteria** screen appears displaying the **Other Services** grid below it.

**Note:** You can enter criteria in the desired **Filter Criteria** fields and click the **Filter** button to filter the **Other Services** list.

4. Click the **View History** or **Deactivate** links as appropriate.

## Navigating Through the Provider Overview Screen

The screenshot shows the 'Other Services' tab selected. The 'Other Services Filter Criteria' section includes dropdown menus for Agency Type, Agency, Service Category, Service Type, Service Description, and Service Status (set to 'Active'). The 'Sort By' dropdown is set to 'Service Category (Ascending)'. Below the filters is a 'Filter' button and a table of 'Other Services'.

|                              |                            | Service Category  | Service Type | Service Description | Service Capacity | Service Status | Effective Date | Agency  |
|------------------------------|----------------------------|-------------------|--------------|---------------------|------------------|----------------|----------------|---|
| <a href="#">edit history</a> | <a href="#">deactivate</a> | Financial Support | Housing      | Housing             |                  | ACTIVE         | 01/01/2005     | Test County Department of Job and Family Services |

5. To add an Other Service, click the **Add Other Service** button.

**Add Other Service** **Delete All** **Change Status - All**

6. To view shared home agreements, click the **Shared Home Agreements** tab.

The **Maintain Shared Home Agreements** screen appears.

The screenshot shows the 'Shared Home Agreements' tab selected. The 'Maintain Shared Home Agreements' section features a table with columns for Effective Date, End Date, Recommending Agency, and Agency Permitted to Use the Home. Below the table is an 'Add Shared Agreement' button.

| Effective Date              | End Date | Recommending Agency | Agency Permitted to Use the Home |
|-----------------------------|----------|---------------------|----------------------------------|
| <b>Add Shared Agreement</b> |          |                     |                                  |

7. To add a shared home agreement, click the **Add Shared Agreement** button.

**Note:** Please refer to the following Knowledge Base articles for additional information:

- [Adding Other Services Under Service Credentials](#)
- [Adding Agency Services Including Shared Home Services](#)

# Navigating Through the Provider Overview Screen

## Viewing Placements/Services

1. To view placements and services, click the **Placement/Services** link in the **Navigation** menu.

The **Placements** tab appears displaying the current or historical placements that have occurred in the provider's home.

The screenshot shows the 'Placements' tab selected in the navigation menu. The 'Placements Filter Criteria' section includes fields for 'From Begin Date' and 'To Begin Date', a 'Sort Results By' dropdown set to 'Begin Date (Descending)', and radio buttons for 'Current', 'Historical', and 'All'. The 'Current' radio button is selected. Below the filter criteria is a 'Filter' button. The main content area displays a table of placements with the following data:

|                            | Person Name/ ID | Gender | DOB        | Age | Begin/End Date | End Reason | Service Description      | Agency                               | Status    |
|----------------------------|-----------------|--------|------------|-----|----------------|------------|--------------------------|--------------------------------------|-----------|
| <a href="#">view leave</a> |                 | FEMALE | 05/05/2008 | 15  | 08/17/2022     |            | Treatment<br>Foster Care | County<br>Children<br>Services Board | Completed |

2. Click the **Current**, **Historical**, or **All** radio buttons to display current placements, historical placements, or all placements.
3. Click the **View Leave** link.
4. To view other services provided to the family, such as counseling, click the **Services** tab.

The **Services Filter Criteria** screen appears.

**Note:** The system populates information on this screen when a public agency has linked the provider to a **Case Service** being provided.

## Navigating Through the Provider Overview Screen

The screenshot shows the 'Services' tab selected in the top navigation bar. Below the navigation bar is a 'Services Filter Criteria' section. It contains two date input fields: 'From Begin Date:' and 'To Begin Date:', each with a calendar icon. Below these is a 'Sort Results By:' dropdown menu set to 'Begin Date (Descending)'. To the right of the dropdown are three radio buttons: 'Current' (selected), 'Historical', and 'All'. A red box highlights these radio buttons. Below the filter criteria is a blue 'Filter' button and a section titled 'Services' which is currently empty.

5. To view children who have been placed on leave from another foster home into this home, click the **Leaves** tab.

**Note:** The system populates information on this screen when a public agency places a child on leave in the home.

The screenshot shows the 'Leaves' tab selected in the top navigation bar. Below the navigation bar is a 'Leaves Filter Criteria' section. It contains two date input fields: 'From Begin Date:' and 'To Begin Date:', each with a calendar icon. Below these is a 'Sort Results By:' dropdown menu set to 'Begin Date (Descending)'. To the right of the dropdown are three radio buttons: 'Current' (selected), 'Historical', and 'All'. A red box highlights these radio buttons. Below the filter criteria is a blue 'Filter' button and a section titled 'Leaves With This Provider' which is currently empty.

6. Click the **Current**, **Historical**, or **All** radio buttons to display current, historical, or all Leaves in the grid.

7. When complete, click the **Provider Overview** link to return to the main screen.

## Navigating Through the Provider Overview Screen

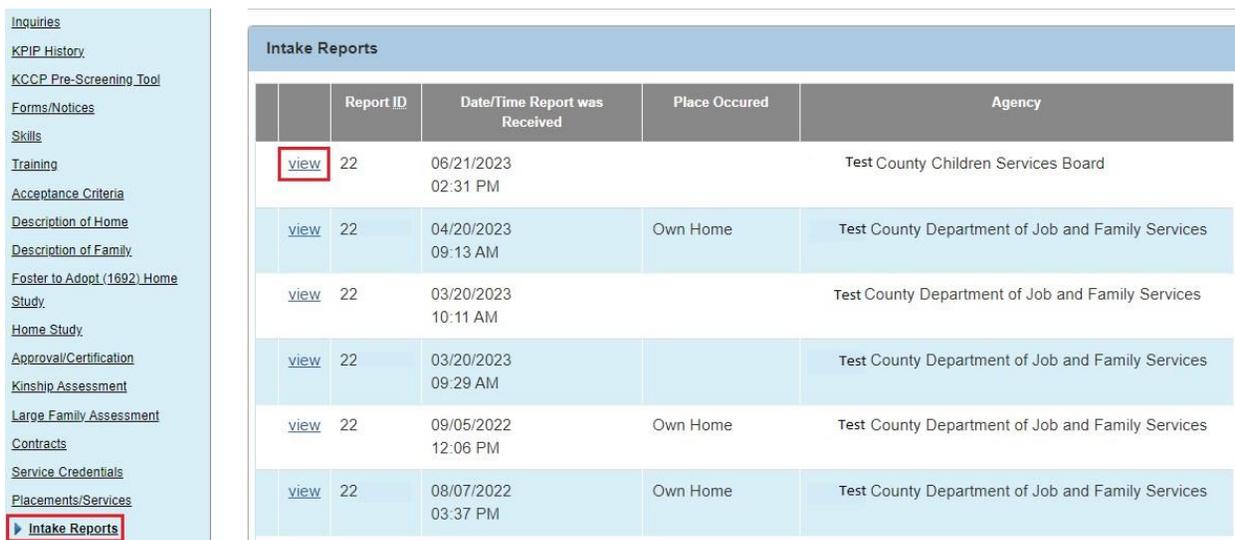
**Note:** Please refer to the following Knowledge Base articles for additional information:

- [Managing Case Services](#)
- [Managing a Leave from a Foster Home](#)
- [Request for Creation of Initial Removal, Placement and Leave Records](#)

### Viewing Intake Reports

1. To view Intake Reports, click the **Intake Reports** link in the **Navigation** menu.

The **CA/N Reports** screen appears.



The screenshot shows the 'Intake Reports' screen. On the left is a navigation menu with various links. The 'Intake Reports' link is highlighted with a red box. The main area displays a table with the following data:

|                      | Report ID | Date/Time Report was Received | Place Occured | Agency  |
|----------------------|-----------|-------------------------------|---------------|---|
| <a href="#">view</a> | 22        | 06/21/2023<br>02:31 PM        |               | Test County Children Services Board               |
| <a href="#">view</a> | 22        | 04/20/2023<br>09:13 AM        | Own Home      | Test County Department of Job and Family Services |
| <a href="#">view</a> | 22        | 03/20/2023<br>10:11 AM        |               | Test County Department of Job and Family Services |
| <a href="#">view</a> | 22        | 03/20/2023<br>09:29 AM        |               | Test County Department of Job and Family Services |
| <a href="#">view</a> | 22        | 09/05/2022<br>12:06 PM        | Own Home      | Test County Department of Job and Family Services |
| <a href="#">view</a> | 22        | 08/07/2022<br>03:37 PM        | Own Home      | Test County Department of Job and Family Services |

2. Click the **View** link in the appropriate row.

### Viewing Rule Violations

1. To view rule violations, click the **Complaints/Rule Violations** link in the **Navigation** menu.

The **Maintain Rule Violation Incidents** screen appears.

## Navigating Through the Provider Overview Screen

|  |  |                             |                      |               |                             |                       |               |  |
|--|--|-----------------------------|----------------------|---------------|-----------------------------|-----------------------|---------------|--|
| <a href="#">Approval/Certification</a>     | <b>Complaints / Rule Violation Incidents</b> |                             |                      |               |                             |                       |               |  |
| <a href="#">Kinship Assessment</a>         | <b>Record ID</b>                             | <b>Date Report Received</b> | <b>Incident Type</b> | <b>Status</b> | <b>Outcome/Outcome Date</b> | <b>Outcome Source</b> | <b>Agency</b> |  |
| <a href="#">Large Family Assessment</a>    | <a href="#">view</a>                         | 06/22/2021                  | Complaint            | Completed     | Not Applicable              | N/A                   | The Village   |  |
| <a href="#">Contracts</a>                  | <a href="#">report</a>                       |                             |                      |               |                             |                       |               |  |
| <a href="#">Service Credentials</a>        |  |                             |                      |               |                             |                       |               |  |
| <a href="#">Placements/Services</a>        |  |                             |                      |               |                             |                       |               |  |
| <a href="#">Intake Reports</a>             |  |                             |                      |               |                             |                       |               |  |
| <a href="#">Complaints/Rule Violations</a> |  |                             |                      |               |                             |                       |               |  |

2. Click the **View** or **Edit** links as appropriate.

## Viewing Waivers

1. To view waiver requests, click the **Waiver** link in the **Navigation** menu.

The **Maintain Waiver Requests** screen appears.

|   |                                     |                       |                       |                        |   |                       |               |                             |  |                        |
|---|-------------------------------------|-----------------------|-----------------------|------------------------|---|-----------------------|---------------|-----------------------------|--|------------------------|
| <a href="#">Inquiries</a>                         | <b>Maintain Waiver Requests</b>     |                       |                       |                        |   |                       |               |                             |  |                        |
| <a href="#">KPIP History</a>                      | Result(s) 1 to 1 of 1 / Page 1 of 1 |                       |                       |                        |   |                       |               |                             |  |                        |
| <a href="#">KCCP Pre-Screening Tool</a>           | <b>Type/State</b>                   | <b>RuleInfo.</b>      | <b>Effective Date</b> | <b>Expiration Date</b> | <b>Agency</b>                                     | <b>ODJFS Response</b> | <b>Status</b> | <b>Closed Date / Reason</b> |  |                        |
| <a href="#">Forms/Notices</a>                     | <a href="#">view</a>                | Waiver - Initial      | 05/05/2007            | 06/11/2007             | Test County Department of Job and Family Services | Pending               | In progress   |                             |  | <a href="#">delete</a> |
| <a href="#">Skills</a>                            | <a href="#">edit</a>                | Occupancy Limitations |                       |                        |   |                       |               |                             |  |                        |
| <a href="#">Training</a>                          | <a href="#">review</a>              |                       |                       |                        |   |                       |               |                             |  |                        |
| <a href="#">Acceptance Criteria</a>               |                                     |                       |                       |                        |   |                       |               |                             |  |                        |
| <a href="#">Description of Home</a>               |                                     |                       |                       |                        |   |                       |               |                             |  |                        |
| <a href="#">Description of Family</a>             |                                     |                       |                       |                        |   |                       |               |                             |  |                        |
| <a href="#">Foster to Adopt (1692) Home Study</a> |                                     |                       |                       |                        |   |                       |               |                             |  |                        |
| <a href="#">Home Study</a>                        |                                     |                       |                       |                        |   |                       |               |                             |  |                        |
| <a href="#">Approval/Certification</a>            |                                     |                       |                       |                        |   |                       |               |                             |  |                        |
| <a href="#">Kinship Assessment</a>                |                                     |                       |                       |                        |   |                       |               |                             |  |                        |
| <a href="#">Large Family Assessment</a>           |                                     |                       |                       |                        |   |                       |               |                             |  |                        |
| <a href="#">Contracts</a>                         |                                     |                       |                       |                        |   |                       |               |                             |  |                        |
| <a href="#">Service Credentials</a>               |                                     |                       |                       |                        |   |                       |               |                             |  |                        |
| <a href="#">Placements/Services</a>               |                                     |                       |                       |                        |   |                       |               |                             |  |                        |
| <a href="#">Intake Reports</a>                    |                                     |                       |                       |                        |   |                       |               |                             |  |                        |
| <a href="#">Complaints/Rule Violations</a>        |                                     |                       |                       |                        |   |                       |               |                             |  |                        |
| <a href="#">Waiver</a>                            |                                     |                       |                       |                        |   |                       |               |                             |  |                        |
| <a href="#">Potential Matches</a>                 |                                     |                       |                       |                        |   |                       |               |                             |  |                        |
| <a href="#">AP Search History</a>                 |                                     |                       |                       |                        |   |                       |               |                             |  |                        |
| <a href="#">Living Arrangement</a>                |                                     |                       |                       |                        |   |                       |               |                             |  |                        |
|   | <a href="#">Add Request</a>         |                       |                       |                        |   |                       |               |                             |  |                        |

2. Click the **View**, **Edit** or **Review** links as appropriate.
3. To add a waiver request, click the **Add Request** button.

**Note:** Please refer to the [Creating a Waiver Request](#) Knowledge Base article for additional information.

# Navigating Through the Provider Overview Screen

## Viewing Potential Matches

To view potential matches for a provider, complete the following steps.

**Note:** The Potential Matches option only applies for Adoptive Providers.

1. Click the **Potential Matches** link in the **Navigation** menu.

The **Potential Matches Search Criteria** screen appears as shown below.

2. Select the **Gender** you wish to search for. (Required)
3. Enter the **Minimum Age** of the children you wish to search for. (Required)
4. Enter additional search criteria if desired.
5. Click the **Search** button.

The **Potential Matches Search Results** grid appears displaying children who match the search criteria.

The screenshot shows the 'Potential Matches Search Criteria' form and the resulting 'Potential Matches Search Results' table. The search criteria form includes fields for Gender (set to Female), Minimum Age (set to 1), and Maximum Age (set to 2). The search results table displays three rows of potential matches, each with a 'view' link highlighted in a red box.

|                      | Name        | Gender | Age | Primary Address Information | Agency  |
|----------------------|-------------|--------|-----|-----------------------------|---|
| <a href="#">view</a> | Test, Child | FEMALE | 1   | Test Address                | Test County Dept. of Job and Family Services      |
| <a href="#">view</a> | Test, Child | FEMALE | 2   | Test Address                | Test County Department of Job and Family Services |
| <a href="#">view</a> | Test, Child | FEMALE | 1   | Test Address                | Test County Children Services                     |

6. Click the **View** link in the appropriate row.

## Navigating Through the Provider Overview Screen

### Viewing AP Search History

1. To view the Alleged Perpetrator search history, click the **AP Search History** link in the **Navigation** menu.

The **Alleged Perpetrator Search History** screen appears displaying the **AP Filter Results** section below it.

|                      | Created Date | Request Type | Request Reason | Person Name / ID | Gender | DOB        | Status / Status Date    | Requesting Agency | Created in Error |
|----------------------|--------------|--------------|----------------|------------------|--------|------------|-------------------------|-------------------|------------------|
| <a href="#">view</a> | 03/31/2023   | Member       | Recert/Update  | Test, Provider   | Female | 03/03/1958 | Completed<br>04/03/2023 | The Village       |                  |

[report](#) AKA's:  
[history](#)

**Note:** You can enter criteria in the desired **Alleged Perpetrator Search History** fields and click the **Filter** button to filter the **AP Filter Results** list.

2. Click the **View** or **Edit** links as appropriate.

**Note:** Please refer to the [Completing an Alleged Perpetrator Search in Ohio SACWIS](#) Knowledge Base article for more information.

### Viewing Living Arrangements

1. To view living arrangements, click the **Living Arrangement** link in the **Navigation** menu.

The **Living Arrangement Filter Criteria** screen appears displaying the **Living Arrangement With This Provider** grid below it.

## Navigating Through the Provider Overview Screen

The screenshot shows a web interface for filtering living arrangements. On the left is a vertical navigation menu with various links, including 'Living Arrangement' at the bottom which is highlighted with a red box. The main content area is titled 'Living Arrangement Filter Criteria' and contains two rows of input fields: 'From Begin Date' and 'To Begin Date', each with a calendar icon; and 'Sort Results By' with a dropdown menu set to 'From Begin Date(Descending)'. To the right of the dropdown are three radio buttons: 'Current' (selected), 'Historical', and 'All'. A red box highlights these radio buttons. Below the filter criteria is a blue 'Filter' button. Underneath is a table titled 'Living Arrangement With This Provider'. The table has a header row with columns: 'Person Name/ ID', 'DOB', 'Living Arrangement Type', 'Who holds Legal Responsibility', 'Begin/End Date', 'End Reason', and 'Agency'. The table body is currently empty.

2. Click the **Current**, **Historical**, or **All** radio buttons to display current, historical, or all living arrangements in the grid.

**Note:** Please refer to the [SACWIS Knowledge Base - Recording a Living Arrangement](#) Knowledge Base article for more information.

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