

Creating a Provider Record from a Provider Inquiry



Knowledge Base Article

Creating a Provider Record From a Provider Inquiry

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Creating a Provider Record From a Provider Inquiry

Overview

The **Ohio SACWIS Inquiry** screens contain information about people who have contacted your agency expressing interest in becoming a Foster and/or Adoptive parent, Relative and/or Non-Relative caregiver, or to inquire about a specific **Child of Interest**, including children available for Adoption.

The **Inquiry Process** is designed to allow users to enter and retrieve relevant information about potential providers and the progress that has been made for the inquiry, such as whether or not an application has been submitted.

In addition, the **Inquiry Process** will assist agencies in maintaining compliance with the **Multiethnic Placement Act (MEPA)** as it pertains to the Adoption, Foster and Kinship application process.

Ohio SACWIS **Home Provider** screens contain information about people who have applied to become a provider and the progress made during the home study / licensing process. To enter new home provider information, complete the following steps.

Creating an Inquiry

1. On the Ohio SACWIS **Home** screen, click the **Provider** tab.
2. Click, **Inquiry**
3. The **Inquiry Search Criteria** screen appears.
4. Your agency name will be pre-populated in the **Agency dropdown** field.
5. **Person Search Criteria:** displays **Search Person As:** User selects search options.

Note: Inquirer, Child of Interest or All. System defaults to, **All**.

6. Enter a name in the **Last Name** field
7. Enter a name (if known) in the **First Name** field.
8. Enter filter criteria in the other fields, as needed.

Note: The field, **Reason for Inquiry**, allows users to filter by **Provider Interest**, **Child of Interest**, or **Provider Interest/Child of Interest**.

Important: The Inquiry **Status** defaults to blank.

9. Make a selection from the Status drop-down menu to narrow the search results.
10. Click, **Search**.

Creating a Provider Record From a Provider Inquiry

The screenshot shows the 'Provider' tab selected in the top navigation bar. Below it, the 'Inquiry' sub-tab is active. The main content area is divided into 'Inquiry Search' and 'Inquiries to be Linked'. The 'Inquiry Search Criteria' section is highlighted with a green box. It contains several input fields: 'Agency' (dropdown), 'Search Person As' (radio buttons for 'Inquirer', 'Child Of Interest', 'All'), 'Prefix' (dropdown), 'First Name' (text input), 'Middle Name' (text input), 'Person ID' (text input), 'Last Name' (text input), 'Suffix' (dropdown), and a 'Sounds Like' checkbox. Below this is the 'Advanced Search Criteria' section with fields for 'Reason for Inquiry' (dropdown), 'Provider Type' (dropdown), 'From Inquiry Date' (calendar), 'Status' (dropdown), 'Inquiry ID' (text input), and 'To Inquiry Date' (calendar). At the bottom left, there are 'Search' and 'Clear Form' buttons, with 'Search' circled in red.

The results appear in the **Inquiry Search Results** section of the screen.

Note: The Inquiry Search returns and displays the **Provider ID** and **Provider Name** on **ALL** inquiry records which are linked to a **Home Provider** or a **Non-ODJFS Provider**.

If the provider already exists in the system, users can:

- Click the **view** link to view the existing information.
- Click the **edit** link to modify the existing information.

Important: Users can only **edit** inquiry records for which the **Status** column is marked as **Pending**.

Note: Click, **Add Inquiry**, if the provider **does not** have a **Pending** inquiry for the logged in agency.

The screenshot shows the 'Inquiry Search Results' section. It displays a table with the following columns: Inquiry ID, Inquirer 1, Inquiry Date, Provider Type, Address, Status, Provider ID, Provider Name, and Agency. There are two rows of data. The first row has an inquiry date of 11/14/2006 and a status of 'Pending'. The second row has an inquiry date of 07/28/2008 and a status of 'Pending'. For each row, there are 'view', 'edit', and 'reprint' links. The 'view' and 'edit' links for the first row are circled in green. At the bottom left, there are 'Add Inquiry' and 'Generate Report' buttons, with 'Add Inquiry' circled in red.

Inquiry ID	Inquirer 1	Inquiry Date	Provider Type	Address	Status	Provider ID	Provider Name	Agency
		11/14/2006	Foster Care		Pending			
		07/28/2008	Foster Care		Pending			

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The **Inquirer** tab appears.

Completing the Inquirers Tab

1. Make a selection from the **Reason for Inquiry** drop-down menu (required).
 - **Provider Interest** = Inquiry to become a Home or Non-ODJFS Provider
 - **Child of Interest** = Inquiry for a **Specific Child of Interest** (will not lead to a creation of a Provider/Provider Type)
 - **Provider Interest/Child of Interest** = Inquiry to become a Home or Non-ODJFS Provider with a **Specific Child of Interest** identified. **NOTE:** This designation must be used to create a Kinship Provider Type.
 - **KPIP Application** = Inquiry to create a Provider record that is needed only to process a new KPIP Application

Note: If the Reason for Inquiry is Provider Interest, Provider Interest/Child of Interest or KPIP Application, the **Provider Type** drop-down field is required.

2. Select the **Inquiry Worker** (required) from the drop-down list.
3. Enter the **Inquiry Date** (required).

Important: The **Inquiry Date** will be locked upon the initial saving of the record. The date selected must be on or prior to the application received date and/or any activity date.

4. Click the **Add Inquirer** button.

Provider > Inquiry > Inquiry Search

Inquirers	Address	Referral Sources	Optional Info	Activity/Status														
Agency: Ohio Child Welfare Agency																		
Reason for Inquiry: *		Inquiry Worker:																
Provider Type:		Inquiry Date:																
Description:		Inquiry ID:																
Created By:		Created Date:																
Inquirer List																		
<table border="1"><thead><tr><th>Person Name /ID</th><th>Gender</th><th>(Age) DOB</th><th>Role</th></tr></thead><tbody><tr><td colspan="5"><input type="button" value="Add Inquirer"/></td></tr></tbody></table>					Person Name /ID	Gender	(Age) DOB	Role	<input type="button" value="Add Inquirer"/>									
Person Name /ID	Gender	(Age) DOB	Role															
<input type="button" value="Add Inquirer"/>																		
Specific Children of Interest																		
<table border="1"><thead><tr><th>Person Name /ID</th><th>Gender</th><th>(Age) DOB</th><th>Relationship to Inquirer 1</th></tr></thead><tbody><tr><td colspan="5"><input type="checkbox"/> Unknown Child(ren) Hint: check if specific child(ren) of interest unknown, this can be in addition to identified child(ren) of interest.</td></tr><tr><td colspan="5"><input type="button" value="Add Child"/></td></tr></tbody></table>					Person Name /ID	Gender	(Age) DOB	Relationship to Inquirer 1	<input type="checkbox"/> Unknown Child(ren) Hint: check if specific child(ren) of interest unknown, this can be in addition to identified child(ren) of interest.					<input type="button" value="Add Child"/>				
Person Name /ID	Gender	(Age) DOB	Relationship to Inquirer 1															
<input type="checkbox"/> Unknown Child(ren) Hint: check if specific child(ren) of interest unknown, this can be in addition to identified child(ren) of interest.																		
<input type="button" value="Add Child"/>																		
Additional Comments (Including details of specific child(ren) of interest):																		
<input type="text"/>																		
<input type="button" value="Spell Check"/> <input type="button" value="Clear"/> 4000																		
<input type="button" value="Apply"/> <input type="button" value="Save"/> <input type="button" value="Cancel"/>																		

Creating a Provider Record From a Provider Inquiry

The **Search for Person** screen appears.

5. Enter the person's information into the filter criteria fields.

Note: If you know a provider's **Person ID**, you can enter that number in the **Person ID** field rather than create a duplicate person or provider in the system.

6. Click, **Search**.

Search For Person

Person ID: ~ OR ~ SSN:

Note: If Person ID or SSN are entered, all other search criteria will be ignored

OR

Last Name: First Name: Middle Name: Gender:

DOB: ~ OR ~ Age Range: -
From Age To Age

[Reference, TCN, and Address Criteria](#) ▾

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

Sort by: Relevance (Highest-Lowest) ▾

+ AKA/Nicknames

Fewer Results More Results

The results appear in the **Person Search Results** section at the bottom of the screen.

7. Click the check box beside the appropriate person's name.

8. Click, **Select**.

Note: If the person is not already in Ohio SACWIS, create a new person record to link to the inquiry.

Person Search Results

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

Include only active case members

	Person Name / ID	Address	Gender	(Age) DOB	Active Case
<input checked="" type="checkbox"/>					Yes

[Related Persons](#) ▾

Creating a Provider Record From a Provider Inquiry

The selected person appears in the **Inquirer List** grid under the **Inquirers** tab.

9. Select the appropriate **Role** from the drop-down list. The Inquirer List must have one person with a role of **Inquirer 1**.

Note: When the inquiry record is linked to a provider record, **Inquirer 1** will become **Applicant 1**.

10. For applicants interested in a specific child, click, **Add Child** in the **Specific Children of Interest** grid.

- Repeat steps 5-9 to link a specific child to the inquiry.

Important: Enter a specific child's name with discretion. Currently, adding a child's name in the **Specific Children of Interest** section may compromise a child's confidentiality in Ohio SACWIS.

11. Select the child's **Relationship to Inquirer 1** from the drop-down list.

Note: Repeat steps, as needed, to add additional children to the **Specific Children of Interest** list.

12. Check the **Unknown** checkbox, when appropriate. (Comments required.)

13. Enter **Additional Comments** as needed.

14. Click the **Address** tab.

Provider > Inquiry > Inquiry Search

Inquirers	Address	Referral Sources	Optional Info	Activity/Status
-----------	---------	------------------	---------------	-----------------

Agency: [text]
Reason for Inquiry: * [Child Of Interest]
Provider Type: [dropdown]
Description: [text]
Created By: [text]

Inquiry Worker: * [text]
Inquiry Date: * [06/04/2018]
Inquiry ID: [text]
Created Date: [text]

Person Name ID	Gender	(Age) DOB	Role
[text]	[text]	[text]	[dropdown]

Add Inquirer

Person Name ID	Gender	(Age) DOB	Relationship to Inquirer 1
[text]	[text]	[text]	[dropdown]

Unknown Child(ren) Hint: check if specific child(ren) of interest unknown, this can be in addition to identified child(ren) of interest.

Add Child

Additional Comments (Including details of specific child(ren) of interest):
[text area]

Spell Check Clear 4000

Apply Save Cancel

Creating a Provider Record From a Provider Inquiry

Important: If completing a **KPIP Application** inquiry, the **Specific Children of Interest** grid will show an additional field of **Existing Assessment Status**. This will determine what type of Kinship Assessment the system will create.

- **No Assessment** = An in-progress initial kinship assessment will be created and a child-specific Kinship Provider Type with a status of 'Pending' will be present on the Provider record.
- **Approved** = A child-specific Kinship Provider Type with status of 'Approved' will be created on the Provider Record.
- **Denied** = A child-specific Kinship Provider Type with a status of 'Denied' will be created on the Provider Record.

Person Name /ID	Gender	(Age) DOB	Relationship to Inquirer 1	Existing Assessment Status ?	
			<input type="text"/>	<div style="border: 1px solid red; padding: 2px;">No Assessment Denied Approved</div>	

Unknown Child(ren) Hint: check if specific child(ren) of interest unknown, this can be in addition to identified child(ren) of interest.

Completing the Address Tab

Note: This screen is view only and the fields auto-populate based on the inquiring person's address on their **Person Profile** screen. If no address appears or a wrong address appears here, you must navigate to that individual's **Person Profile** screen and then modify the information there.

To save the inquiry record, the **inquiring person must have:**

- Their address recorded in the system
 - A primary contact listed. (**Yes** appears in the **Primary**).
1. Review the **Contact List** information, which can be edited through the person profile on the **Address** tab. (See the **Provider Information Tabs** sub-section of this KBA.)
 2. Review the **Associated Providers** information, which is **view only** and lists current non-ended members that exist in other provider records.
 3. Click the **Referral Sources** tab.

Creating a Provider Record From a Provider Inquiry

Provider > Inquiry > Inquiry Search

Inquirers	Address	Referral Sources	Optional Info	Activity/Status
Agency: [redacted]			Family Name: [redacted]	
Address List				
Type	Address	Effective Date	End Date	Primary
Medicaid Mailing	[redacted]	01/00/2018		Yes
Contact List				
Type	Contact Details	Primary		
Associated Providers				
Provider ID	Provider Name	Provider Address	Provider Type/Recommending Agency/Approval Date/Type Status	

Completing the Referral Sources Tab

The **Referral Sources** screen appears.

Note: This screen shows how the inquiring person found out about becoming a provider.

1. From the **Available Referral Sources** list, select the appropriate source(s). You can select more than one. **This is a mandatory field once the Decision status has been changed from Pending or Active.**

Note: For Kinship Provider Types and KPIP Application Reason for Inquiry, the system will automatically populate a response of **'Self'** but can be modified as applicable.

2. Click, **Add**.
3. The source(s) will appear in the **Selected Referral Sources** field.
4. If necessary, complete the **Description**.
5. If the inquiring person attended a recruitment event, click the **Add Event** button to add the information.

Provider > Inquiry > Inquiry Search

Inquirers	Address	Referral Sources	Optional Info	Activity/Status
Referral Sources				
Available Referral Sources:		Selected Referral Sources:		
[redacted] Add		[redacted]		
Recruitment Event				
Relative				
School Contacts/Groups				
School/Educational				
Self				
Service Organization Meeting				
Social Media				
State Fair				
Description:				
[redacted]				
[Spell Check] [Clear] 1000				
Attended Recruitment Events				
Agency	Event Type	Event Name	Begin Date	End Date
Add Event				

Creating a Provider Record From a Provider Inquiry

The **Recruitment Event Filter Criteria** screen appears (as seen below).

1. Click, **select**, beside the appropriate recruitment event.

Recruitment Event Filter Criteria

Agency: Ohio Child Welfare Agency

Event Type: Adoption Informational Meeting

From Start Date: [] To Start Date: []

Successful Event: Yes

Sort Results By: Start Date (Descending)

Filter

Recruitment Events

Result(s) 1 to 15 of 380 / Page 1 of 26

Type	Name	Start Date	End Date	#of Participants	Event Success?	Agency	
select	Adoption Informational Meeting	FCA Info Mtg at Ellet Branch Library	06/24/2018	06/24/2018	10	Yes	Ohio Child Welfare Agency
select	Adoption Informational Meeting	FCA Info Mtg at Arlington Memorial Baptist Church	06/24/2018	06/24/2018	13	Yes	Ohio Child Welfare Agency
select	Adoption Informational Meeting	FCA Info Mtg at Fairlawn-Bath Branch Library	06/06/2018	06/06/2018	6	Yes	Ohio Child Welfare Agency
select	Adoption Informational Meeting	FCA Info Mtg at Fairlawn-Bath Branch Library	06/06/2018	06/06/2018	13	Yes	Ohio Child Welfare Agency
select	Adoption Informational Meeting	FCA Info Mtg at North Hill Branch Library	05/23/2018	05/23/2018	13	Yes	Ohio Child Welfare Agency

The **Referral Sources** screen appears with the **Attended Recruitment Event** linked.

Note: Repeat **Steps 5-6** as necessary to link additional events.

2. Click the **Optional Info** tab.

Referral Sources

Optional Info

Attended Recruitment Events

Agency	Event Type	Event Name	Begin Date	End Date		
view	Ohio Child Welfare Agency	Orientation	Other Foster/Adoptive Parent	11/10/2008	01/01/2050	delete
view	Ohio Child Welfare Agency	Orientation	Internet / Agency Website	11/10/2008	01/01/2050	delete
view	Ohio Child Welfare Agency	Adoption Informational Meeting	FCA Info Mtg at Ellet Branch Library	06/24/2018	06/24/2018	delete

Add Event

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The **Optional Info** screen appears.

Completing the Optional Info Tab

1. Complete the fields on the screen, as needed.
2. Click, **Activity/Status**.

The screenshot shows a web interface with a navigation bar at the top containing tabs: Inquirers, Address, Referral Sources, **Optional Info** (highlighted in green), and Activity/Status (circled in red). The main content area is divided into several sections, all enclosed in a red border:

- Acceptable Child Characteristics:** Includes input fields for Minimum Age and Maximum Age, dropdown menus for Sibling Group and Minor Mother, and dropdown menus for Gender and Accept More Than 1 Child.
- Race:** A list of checkboxes for various racial categories: American Indian, Alaskan Native, Native Hawaiian, White, Unable to Determine, Asian, Black/African American, No Preference/All, Other Pacific Islander, Multi-racial (one or more races unknown), and Multi-racial (all races unknown).
- Ethnicity/Ancestry:** Features a 'Hispanic/Latino' dropdown menu. Below it are two panes: 'Available Ethnicity' with a search bar and a list of options (Latino, Mexican, Native American, Other, Puerto Rican, Russian, Somali, South American) and an 'Add' button; and 'Selected Ethnicity' with a search bar and a 'Remove' button.
- Other Information:** Includes input fields for # of Bedrooms, a dropdown menu for Marital Status (set to 'Unknown'), and a dropdown menu for Transportation Available.

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The **Activity/Status** screen appears.

Completing the Activity/Status Tab

1. In the **Status** grid, the default selection will be, **Pending**. Keep that selection.
2. Click, **Add Activity** button.

Note: Under the **Activity Type**, required activities have been listed to aid agencies in selecting the appropriate types to compete the inquiry record.

The **Activity Information** screen appears.

3. Make a selection from the **Activity Type** drop-down menu.
4. In the **Date of Activity** field, enter the date the activity occurred.
5. If needed, enter comments in the **Comments** field.
6. Click the **OK** button at the bottom of the screen.

Activity Information

Activity Type: *

Date of Activity: *

Comments:

Spell Check Clear 4000

Created In Error

Created By: _____ Created Date: _____

Modified By: _____ Modified Date: _____

OK Cancel

Inquirers Address Referral Sources Optional Info **Activity/Status**

Inquiry Activity Log Filter Criteria

Created In Error: Exclude Include

Inquiry Activity Log

	Activity Type	Date of Activity	Comments	Created In Error
view	Application Received	05/15/2023		
view	Application Provided	05/01/2023		
view	Adoption/Foster packet provided	05/01/2023		

Following Activities are required to complete this inquiry: Application Provided, Application Received, Adoption/Foster Packet Provided

[Add Activity](#)

Status

Status: * Status Date: Closed Reason:

Comments:

Spell Check Clear 4000

Apply Save Cancel

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After clicking OK, the **Activity/Status** tab (Decision screen) appears, displaying the new information in the **Inquiry Activity Log** grid.

The **Activity/Status** screen appears.

7. Click, **Apply**.

To accept the modified data, click Apply.

Provider > Inquiry > Inquiry Search

Inquiry Activity Log Filter Criteria
Created In Error: Exclude Include

Inquiry Activity Log

Activity Type	Date of Activity	Comments	Created in Error
view Adoption packet provided	07/17/2007	Just wanted information regarding Adoption.	

[Add Activity](#)

Status
Status: Status Date: Closed Reason:

Comments:

[Spell Check](#) [Clear](#) 4000



The **Activity/Status** screen displays the following message at the top of the screen:

Inquiry ID ##### has been saved.

Inquiry ID ##### has been saved.

Provider > Inquiry > Inquiry Search

Inquiry Activity Log Filter Criteria
Created In Error: Exclude Include

Inquiry Activity Log

Activity Type	Date of Activity	Comments	Created in Error
view Foster Care	09/05/2018		
view Application Provided	09/05/2018		

Important: Based on the Provider Type selected, certain Activity Types are required to complete the inquiry record. **Application Provided**, **Application Received**, and **either Adoption Packet or Adoption/Foster Care Packet** must be selected to complete the inquiry record.

Note: If a **KPIP Application** is the Reason of Inquiry, the system will automatically populate an Inquiry Activity Log of Application Received as of the Inquiry Date entered.

Creating a Provider Record From a Provider Inquiry

For Provider Types:

Adoption (ICPC), or Adoption Foster Caregiver Applicant (1692)

Required Activities:

Application Provided
Application Received
Adoption Packet Provided

For Provider Types:

Foster, Foster/Adoptive, Foster Care (ICPC), Foster Care/Adoption (ICPC)

Required Activities:

Application Provided
Application Received
Adoption/Foster Packet Provided

For Provider Types:

Adoptive Care-International

Required Activities:

Application Received

For Provider Types:

Kinship Care-Relative, Kinship Care-Non-Relative, Kinship Care-Relative (ICPC) or Kinship Care-Non-Relative (ICPC)

Required Activities:

None

For Provider Type:

Adoptive Out- of- State (when creating a non-ODJFS provider)

Required Activities:

Adoption Packet Provided

Note: If an activity has been entered incorrectly, you can mark the activity **Created in Error** and re-enter the appropriate activity type and date.

Important: The Inquiry Activity Log Filter allows users to Exclude and Include Created in Error Activities.

8. To complete the inquiry for all Provider types (excluding Kinship Provider Types), select **Screen In- Application Received** in the Decision field drop-down list.

Important: The Screen In – Application Received selection is not available until AFTER an activity type of Application Received is recorded.

Creating a Provider Record From a Provider Inquiry

- To complete the inquiry for Kinship Provider Types, select the status **Screen in Kinship Inquirer**

The screenshot shows a form with a 'Status' dropdown menu. The dropdown is open, showing options: 'Closed', 'Created in Error', 'Pending', and 'Screen in Kinship Inquirer'. The 'Screen in Kinship Inquirer' option is highlighted with a red box. Below the dropdown is a 'Status Date' field with a calendar icon. To the left of the dropdown is a 'Status: *' label. Below the dropdown is a 'Closed Reason:' field with a dropdown arrow. Below that is a 'Comments:' field with a large text area. At the bottom left are 'Spell Check' and 'Clear' buttons, and a '4000' field.

- To complete the inquiry for a KPIP Application Reason for Inquiry, select the status **KPIP Inquiry Completed**

The screenshot shows a form with a 'Status' dropdown menu. The dropdown is open, showing options: 'Closed', 'Created in Error', 'Pending', and 'KPIP Inquiry Completed'. The 'KPIP Inquiry Completed' option is highlighted with a red box. Below the dropdown is a 'Status Date' field with a calendar icon. To the left of the dropdown is a 'Status: *' label. Below the dropdown is a 'Closed Reason:' field with a dropdown arrow. Below that is a 'Comments:' field with a large text area. At the bottom left are 'Spell Check' and 'Clear' buttons, and a '4000' field.

Once the Decision type of Screen in-Application Received, Screen in Kinship Inquirer or KPIP Inquiry Completed is saved, the inquiry becomes a completed inquiry. An inquiry must be completed before you can link it to a provider.

- Click, **Save**.

The **Inquiry Search Criteria** screen appears.

Linking the Inquiry to a Provider

- To link the completed inquiry to a provider, click the **Inquiries to be Linked** tab.

Creating a Provider Record From a Provider Inquiry

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

✔ Inquiry ID has been saved.

Inquiry Search **Inquiries to be Linked**

Inquiry Search Criteria

Agency: Ohio Child Welfare Agency

Search Person As: Inquirer Child Of Interest All

Prefix:

First Name:

Middle Name:

Person ID:

Last Name: Taylor

Suffix:

Sounds Like
[HINT: Applies to first, middle and/or last name only.
Wildcard (%) search and 'Sounds Like' function cannot be used together.]

The **List of Inquiries to be Linked to Provider** screen appears.

2. Click the **View** hyperlink to review the inquiry.
3. Click the **Link** hyperlink to link the inquiry to a **Provider**.

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

Inquiry Search **Inquiries to be Linked**

List of Inquiries to be Linked to Provider

	Inquiry ID	Inquirer 1	Inquiry Date	Provider Type	Address	Status	Agency
view link			06/18/2018	Kinship Care-Non Relative		Screen In - Application Received/Accepted	Children Services
view link			07/24/2017	Adoptive Home-Out of State		Create Non-ODJFS Provider	Children Services
view link			03/28/2018	Foster Care		Screen In - Application Received/Accepted	Children Services

The **Link Provider Information** screen appears.

4. If no provider record exists for the **Person ID** listed on the inquiry, click the **Add New Provider** button.

Link Provider Information

Provider ID	Provider Name	Provider Address	Provider Type/ Recommending Agency/ Approval Date / Type Status
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[Add New Provider](#)

Creating a Provider Record From a Provider Inquiry

5. If a provider record does exist, click the **link** hyperlink next to that provider.

Link Provider Information

Provider ID	Provider Name	Provider Address	Provider Type/ Recommending Agency/ Approval Date / Type Status
link			

[Add New Provider](#)

[Cancel](#)

The **Manage Provider Details** screen appears, defaulted to the **Basic** tab.

Completing the Basic Tab

1. Edit the **Provider Status** and **Status Effective** date as needed.

Note: Information automatically populates in the other fields.

2. Click the **Address** tab.

Note: The provider address cannot be edited until a home study or kinship assessment is created in **Pending** status.

Note: Contact the Help Desk if linking the inquiry did not assign a user to the provider.

Manage Provider Details

PROVIDER NAME / ID: [redacted] CATEGORY: Non-ODJFS

Basic **Address** Members Relationships Caregivers Capacity

Provider Name Information

Provider Name	Effective Date	End Date
dlogolonski, stephen	11/22/2017	

Provider AKA Name Information

Provider AKA

Provider Type Information

Closed Type Status: Exclude Include Foster to Adopt Exclude Include

Provider Type/Child Name	Agency	Type Effective Date	Type End Date	Type Status
view Adoptive Home-Out of State	Ohio Child Welfare Agency	11/22/2017		Active

Provider Status	Reason	Status Effective Date
view Active		11/22/2017

Provider Reference Information

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

Creating a Provider Record From a Provider Inquiry

The **Address** tab screen appears.

Completing the Provider Information Tabs

1. Verify the **Provider Contact** section is complete.

Important: Both the **Provider Address** and **Provider Contact** sections must have a record with the **Primary** box checked to save the record.

Basic **Address** Members Relationships Caregivers Capacity

Provider Address [View Address History](#)

Type	Address	Effective Date	Primary	Hazard
view Residence		11/22/2017	Yes	No

Provider Contact

Type	Details	Primary
edit Cell		Yes

[Add Contact](#)

Note: If the Provider Contact section is incomplete, the following warning message appears upon save (example):

1 validation message(s) We found a few areas that need your attention:
• Primary Contact Information for provider must be added.

2. If there is no existing primary contact information, click the **Add Contact** button.

1 validation message(s) We found a few areas that need your attention:
• Primary Contact Information for provider must be added.

Provider / Workload / Provider Information
Manage Provider Details

PROVIDER NAME / ID: CATEGORY: Non-ODJFS

Basic **Address** Members Relationships Caregivers Capacity

Provider Address [View Address History](#)

Type	Address	Effective Date	Primary	Hazard
view Residence		11/22/2017	Yes	No

Provider Contact

Type	Details	Primary
edit Cell		No

[Add Contact](#) [delete](#)

Creating a Provider Record From a Provider Inquiry

The **Contact Information** screen appears.

3. In the **Type** field, select the primary contact type from the drop-down list.
4. Click the **Primary** check box.
5. Fill in the other fields, as needed.
6. Click, **OK**.

The screenshot shows the 'Contact Information' form. The 'Type' dropdown is set to 'Cell'. The 'Primary' checkbox is checked and circled in red. The 'Phone' field is empty, and the 'Ext.' field is also empty. The 'Description' field is empty. The 'Created Date' is 09/06/2018 09:23:35 AM, and the 'Modified Date' is 09/06/2018 11:00:54 AM. The 'Created By' and 'Modified By' fields are empty. The 'OK' button is circled in red.

Important: If this box is not checked, the previous screen will not show **Yes** in the **Primary** column and you cannot save the record.

The **Provider Address** screen appears, displaying the populated **Provider Contact** section. The **Primary** column displays a **Yes** if the **Primary** check box was selected.

1. If the **Provider Contact** information was previously entered, but the **Primary** column does not say **Yes**, click **edit** and then click the **Primary** check box.
2. Click the **Members** tab.

The screenshot shows the 'Provider Address' screen. The 'Members' tab is circled in red. The 'Provider Address' section shows a table with columns: Type, Address, Effective Date, Primary, Hazard. The 'Provider Contact' section shows a table with columns: Type, Details, Primary. The 'Add Contact' button is visible at the bottom.

Type	Address	Effective Date	Primary	Hazard
view Residence		11/22/2017	Yes	No

Type	Details	Primary
edit Cell		No

The **Current Active Members** screen appears.

1. Verify the **Household Marital Status** section is complete.

Important: The **Household Marital Status** section must have a record identifying the Provider's marital status to save the record.

2. If there is no existing marital status information, click the **Add Marital Status** button.

Creating a Provider Record From a Provider Inquiry

Basic Address **Members** Relationships Caregivers Capacity

Current Active Members [View Member History](#)

Name / ID	Gender	DOB	Age	Role	Effective Date
view				Primary Member	11/22/2017

Household Marital Status [View Marital Status History](#)

Provider Marital Status	Effective Date
edit Married two parent household with two biological/adoptive parents	11/22/2017 delete

[Add Marital Status](#)

The **Household Marital Status Details** screen on the **Provider** record appears.

3. In the **Marital Status** field, select the appropriate status from the drop-down list. (Required)
4. In the **Effective Date** field, enter the effective date of the selected Marital Status. (Required)
5. Click the **OK** button.

Home Case **Provider** Financial Administration

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

PROVIDER NAME / ID: [REDACTED] CATEGORY: Non-ODJFS

Household Marital Status Details

Marital Status* [REDACTED]

Effective Date* [REDACTED]

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

The **Members** tab appears displaying the new information in the **Household Marital Status** grid.

Note: The **Caregivers** and **Capacity** tabs cannot be edited until a home study/kinship assessment is created in **Pending** status.

6. When complete, click the **Save** button at the bottom of the screen.

Creating a Provider Record From a Provider Inquiry

Basic Address **Members** Relationships Caregivers Capacity

Current Active Members [View Member History](#)

Name / ID	Gender	DOB	Age	Role	Effective Date
view				Primary Member	11/22/2017

Household Marital Status [View Marital Status History](#)

Provider Marital Status	Effective Date
edit Married two parent household with two biological/adoptive parents	09/06/2018 delete

[Add Marital Status](#)

[Apply](#) **Save** [Cancel](#)

The **Provider Overview** screen appears showing your data has been saved. From this screen, you can add activity logs, create home studies, access provider training history, etc.

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

Note: Users may have different levels of edit capabilities from the **Provider Overview** screen, based on security, as well as the provider type status.

Provider Overview

Activity Log

Invites

Forms/Notices

Skills

Acceptance Criteria

Description of Home

Large Family Assessment

Your data has been saved.

PROVIDER NAME / ID: [redacted] CATEGORY / STATUS: **Non-ODJFS / Active**

PRIMARY ADDRESS: [redacted] PRIMARY CONTACT: Cell: [redacted]

Close

Completing the Provider Workload Screen

Once the inquiry is linked to a provider, it will appear on your workload list as shown below.

Home Case **Provider** Financial Administration

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

Workload

Sort By: Provider Name (Ascending) [Filter](#)

[redacted]

If you need additional information or assistance, please contact the OFC Automated Systems Help Desk at SACWIS_HELP_DESK@jfs.ohio.gov .