

Ohio Certification for Agencies and Families (OCAF)

OCCRRA User Guide



Department of
Job and Family Services

OCAF OCCRRA User Guide

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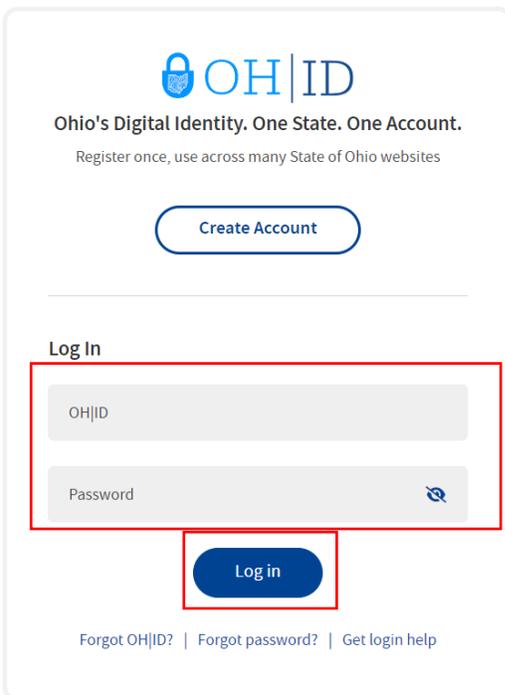
Overview

This article describes how to enter and update an inquiry for Foster Care and/or Adoption in the Ohio Certification for Agencies and Families (OCAF) system.

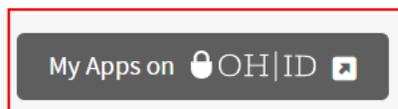
Getting Started

To gain access to the OCAF system:

1. Contact your Office of Families and Children (OFC) Liaison (currently Katina Bays) to complete a paper JFS 7078 form with the correct business role.
2. The OFC Liaison will send this form to SACWIS_Access@jfs.ohio.gov.
3. You will receive an email from the Office of Information Services (OIS) when the request is completed, containing your OH|ID and temporary password.
4. Once you've received your OH|ID and password, proceed to [MyOhio.gov](https://myohio.gov).

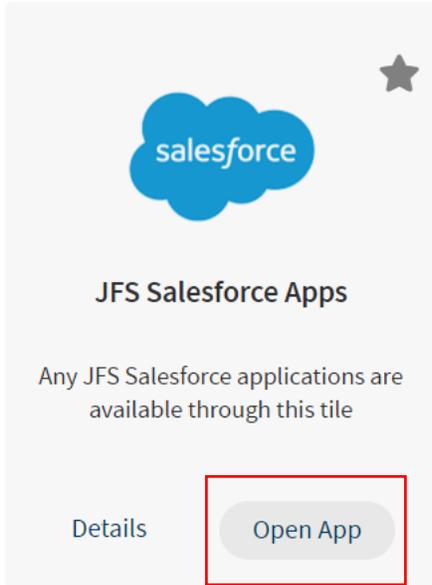


5. Upon successful logon into MyOhio.gov, you'll choose the grey **My Apps on OH|ID** button and set up your Security Questions as well as change your password.



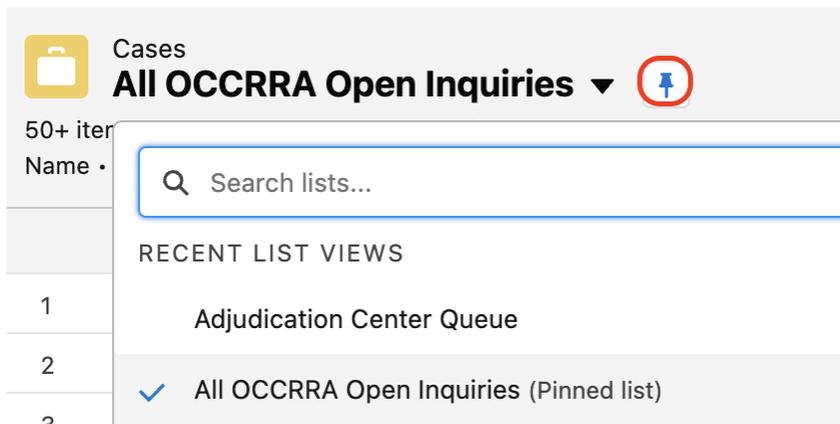
6. After completing this step, you should see the **JFS Salesforce Apps**. Click on the **Open App** button to enter the **Ohio Certification for Agencies and Families (OCAF)** system.

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Helpful Hints About the OCAF System

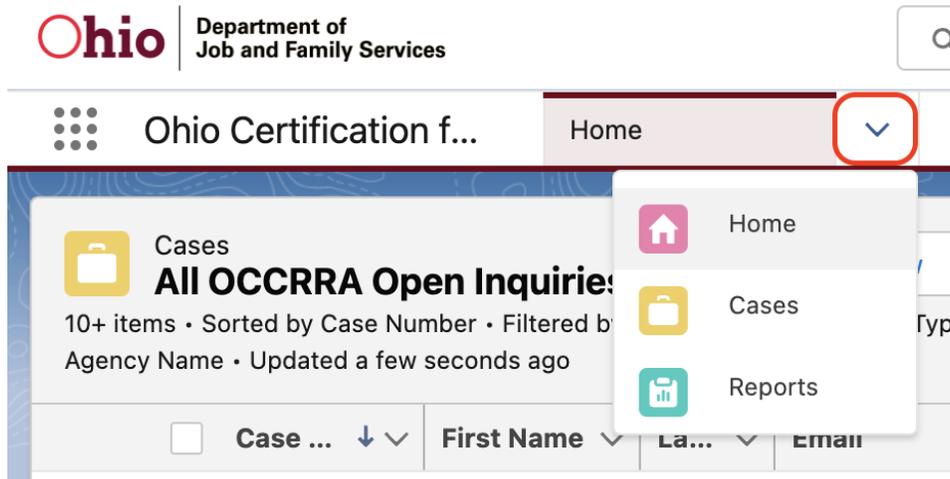
- You may use the web browser back arrow button to return to the previous screen or navigate between record tabs within Salesforce.
- All items in blue font contain a hyperlink to something else. Click on it to navigate to the corresponding information page.
- On the **Accounts**, **Contacts** and **Cases** (represents **Inquiries**) page, each contains a list view that can be changed and pinned for your convenience. The drop-down arrow next to the list can be changed. To keep that list, click the pin symbol.



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Navigating OCAF

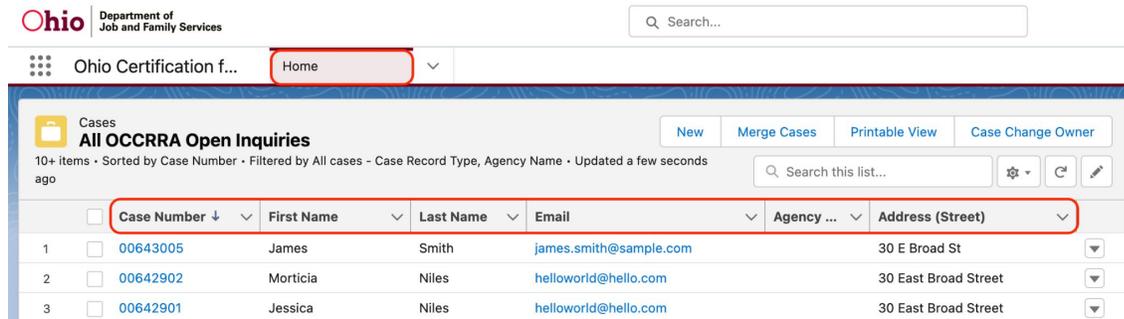
After logging into the system, the tabs at the top will guide you through the different work items in OCAF.



Home Tab

The **Home** page will be the initial screen presented each time you login to OCAF. It will display:

The list of **Child Placement Inquiries** submitted to OCCRRA.



The grid across the top will provide helpful information about each record:

- **Case Number** (Inquiry Number) – Clicking this blue hyperlink will navigate you into the Case (OCAF Inquiry) record
- **First Name** and **Last Name** - Inquirer's Name
- **Email** - Inquirer's Email
- **Agency Name** - Agency that the Inquiry is submitted to. This will be blank if it's submitted to OCCRRA.
- **Address (Street)** - Street Address of the Inquirer

Within the Home page, users also find **OCAF Dashboard** where users can see high level Inquiries statistics for OCCRRA and Other Agencies. The dashboard visualizes the number of

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Inquiry within each agency and status. To get more details about the inquiry, users can click on the View **Report** link under the Total Inquiries with Status Breakdown widget.

Note that the Dashboard does not auto-refresh when it is opened. To ensure the dashboard presents the latest information, click **Refresh** on the header of the Dashboard.

Dashboard
OCAF Dashboard
 Home Page Dashboard containing Agency, Individual Applications, and Inquiries
 As of Feb 16, 2023 11:20 AM · Viewing as Catherine ORRA

The source report is based on a report type that is inaccessible to the dashboard's running user.

Total Inquiries with Status Breakdown

| Agency Name | Status | Count |
|---------------------|---------------|-------|
| Adopt America ... | Email Sent | 2 |
| | User Enrolled | 1 |
| Adoption Circle | New | 1 |
| | Email Sent | 5 |
| Adoption Link, I... | Email Sent | 1 |
| Advantage Fam... | Email Sent | 4 |
| Allen County C... | Email Sent | 1 |
| A New Leaf, Inc. | Email Sent | 5 |
| | User Enrolled | 1 |

Number of Active Agencies Report

| Account Name | OCAF Agency Function |
|--|----------------------|
| Adams County Children Services | Foster Care/Adoption |
| Adolescent Oasis, Inc. | Foster Care/Adoption |
| Adopt America Network (former Midwest) | Adoption |

Cases Tab

The **Cases** tab displays inquiries submitted online or by agency workers for OCCRRA as well as any specific Agency

Ohio | Department of Job and Family Services

Search...

Ohio Certification f... **Cases**

Cases
All OCCRRA Open Inquiries

50+ items · Sorted by Case Number · Filtered by All cases - Case Record Type, Agency Name · Updated a few seconds ago

| Case Number | First Name | Last Name | Email |
|-------------|------------|-----------|------------------------|
| 1 00643005 | James | Smith | james.smith@sample.com |
| 2 00642902 | Morticia | Niles | helloworld@hello.com |
| 3 00642901 | Jessica | Niles | helloworld@hello.com |

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Reviewing an Inquiry

From the **Home** tab or the **Cases** tab, click on the case number to open the submitted inquiry.

The Inquiry's **Details** tab appears, along with Related Tab to show detailed information about the Inquiry.

The screenshot shows the Ohio Department of Job and Family Services OCCRRA interface. At the top left is the Ohio logo and the text "Department of Job and Family Services". To the right is a search bar with the text "Search...". Below this is a navigation bar with a grid icon, the text "Ohio Certification f...", and a dropdown menu with "Cases" selected and highlighted with a red box. Below the navigation bar is a header for the "Cases" section, featuring a briefcase icon, the text "Cases", and "All OCCRRA Open Inquiries" with a dropdown arrow and a pin icon. Below the header is a summary line: "50+ items • Sorted by Case Number • Filtered by All cases - Case Record Type, Agency I Updated a minute ago". Below the summary is a table with columns for "Case Number", "First Name", and "Last Name". The first row shows case number "00643005" (circled in red), first name "James", and last name "Smith". The second row shows case number "00642902", first name "Morticia", and last name "Niles".

| | <input type="checkbox"/> Case Number ↓ | First Name | Last Name |
|---|--|------------|-----------|
| 1 | <input type="checkbox"/> 00643005 | James | Smith |
| 2 | <input type="checkbox"/> 00642902 | Morticia | Niles |

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Details

The **Details** page will contain **Inquiry** record information and **Inquirer's Contact** information. Review the Inquiry and Inquirer's Detail to determine the next step on this inquiry.

| | |
|--|--|
| Details | Related |
| ▼ Inquiry Information | |
| Status | Agency Name |
| Email Sent | |
| I am interested in becoming a Adoptive Parent | Assign to OCCRRRA ⓘ <input checked="" type="checkbox"/> |
| | Service Delivery Area (SDA) ⓘ 1 |
| ▼ Inquirer Information | |
| First Name | Last Name |
| James | Smith |
| Date of Birth | Marital Status |
| 2/1/1965 | Single |
| Address | County |
| 30 E Broad St Columbus, Ohio 43215 United States | Adams |
|  | Email |
| | james.smith@sample.com |
| Phone Number | |
| (614) 123-1234 | |

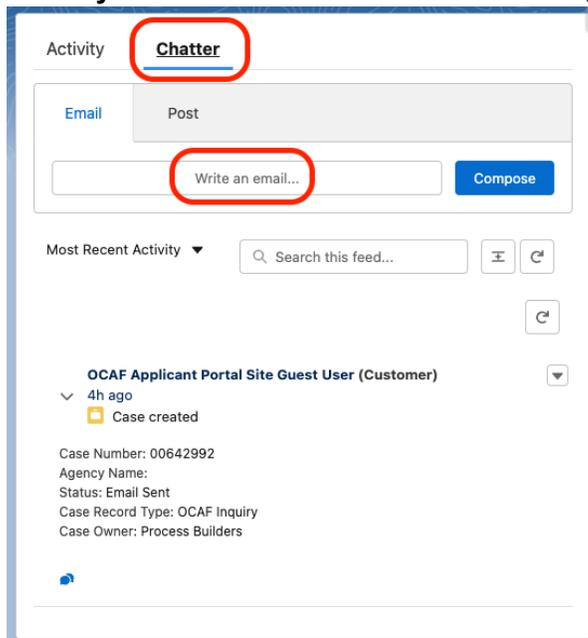
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Assign Service Delivery Area

1. From the Case Details page, click on the pencil icon next to **Service Delivery Area (SDA)** ()
2. Select the Service Delivery Area
3. Click **Save**.

Sending an Email to Applicant(s)

4. From the Case Details page, focus on the right side of the screen. There is a section for **Activity** and **Chatter**. Within the **Chatter** tab, click where it says **Write an email ...**



5. Add an email address in the **To** section. As you start typing, it may pop into the box for you. Select the desired email recipients.



6. Enter the **Subject** of the email.
7. Enter the message for the Inquirer on the Body of the Email
8. Click **Send**. The emails will stay with this Case/Inquiry record within the system.

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Subject: Child Placement Inquiry

Thank you for submitting Child Placement Inquiry.

After review, I will need more information from you on the Inquiry. Please contact me at XXX-XXX-XXXX to discuss further details about the Inquiry.

Thank you,
ORRA.

Saved **Send**

9. Click the **Home** or **Cases** tab to return to your list of inquiries.

Assigning an Inquiry to an Agency

1. From the Case **Details** tab double click on the pencil icon next to **Agency Name** ()
2. Search for the Agency Name that the Inquirer and Inquiry will be assigned to and select the agency name when found.

Agency Name

ohio

Show All Results for "ohio"

- Dungarvin **Ohio**, Inc.
OFC Foster Adopt Agency
- Ohio** Mentor, Inc.
OFC Foster Adopt Agency
- Res-Care **Ohio**, Inc. dba StepStone Family & Youth Services
OFC Foster Adopt Agency
- Adoption Home Study Services of **Ohio**, Inc.
OFC Foster Adopt Agency
- America World Adoption Association-**Ohio**
OFC Foster Adopt Agency

3. Uncheck **Assign to OCCRRA** checkbox below the agency name

* Agency Name 

 Angels Guarding Youth Services, Inc. 

Assign to OCCRRA  

4. Click **Save** when the Agency and Assign to OCCRRA checkbox have been updated.

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5. Validate that the Case Owner has been updated to the Agency selected.

The screenshot displays a case record for Case 00642992. The Case Owner is listed as 'Angels Guarding Youth Services, Inc.', which is circled in red. Below the case details, the 'Inquiry Information' section shows the Agency Name as 'Angels Guarding Youth Services, Inc.'.

| Agency Name | Status | Case Record Type | Case Owner |
|--|------------|------------------|--|
| Angels Guarding Youth Services, Inc. | Email Sent | OCAF Inquiry | Angels Guarding Youth Services, Inc. ↗ |

| Details | | Related |
|-----------------------|--|---------|
| ▼ Inquiry Information | | |
| Status | Agency Name | |
| Email Sent | Angels Guarding Youth Services, Inc. | |

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