

Ohio Certification for Agencies and Families (OCAF)

Agency User Guide



Department of
Job and Family Services

OCAF Agency User Guide

Table of Contents

Overview	3
Getting Started	3
Helpful Hints About the OCAF System	3
Navigating OCAF	4
Home Tab	4
Accounts Tab	7
Individual Applications Tab	7
Cases Tab	7
Reviewing an Application	8
Assign the Application	8
Details	9
Applicants	10
Household Members	11
Home Arrangements	11
Interest & Experience	12
References	12
Files	13
Approving/Returning an Application	14
Sending an Email to Applicant(s)	15

OCAF Agency User Guide

Overview

This article describes how to enter an inquiry for Foster Care and/or Adoption in the Ohio Certification for Agencies and Families (OCAF) system and have prospective resource families complete a JFS 01691.

Getting Started

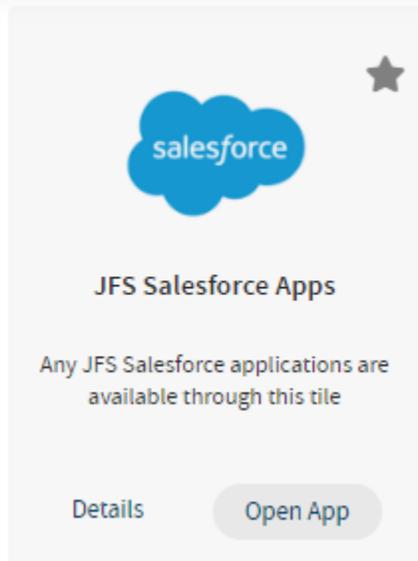
To gain access to the OCAF system, you must submit a completed JFS 7078 to SACWIS_Access@jfs.ohio.gov. Enter the appropriate role on the form based on the type of agency you are employed by:

Role Name	Agency Type Access
EIDMX_JFS_S - OFC – OCAF Private Agency Worker	Private Agency
EIDMX_JFS_C - OFC – OCAF County Agency Worker	Public Agency

Private agency users will require a paper 7078 to be submitted while the digital 7078 can be utilized by public agencies users. Upon approval, an email will be sent by the Automated Systems Help Desk with details on how to log-in to OCAF.

MyOhio Access

After the user is properly provisioned for access to OCAF, begin by accessing MyOhio. Navigate to the apps. Locate and click on the tile for JFS Salesforce Apps.

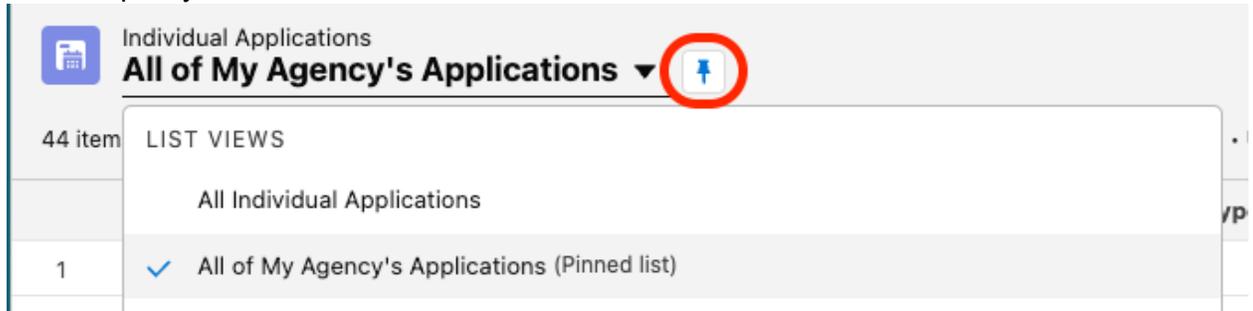


Helpful Hints About the OCAF System

- You may use the web browser back arrow button to return to the previous screen or navigate between record tabs within Salesforce.

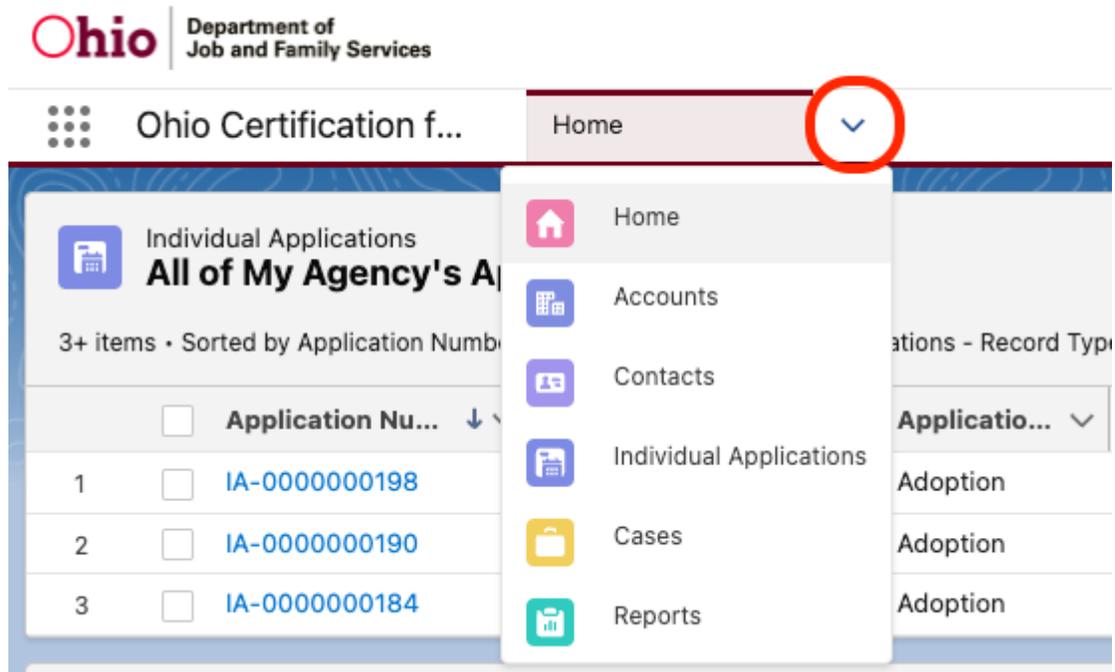
OCAF Agency User Guide

- 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**, **Individual Applications**, 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.



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 Applications** (commonly known as the JFS 01691) submitted to your agency.

OCAF Agency User Guide

The screenshot shows the 'All of My Agency's Applications' page. At the top, there is a search bar and a navigation menu with 'Home' selected. Below the navigation is a table with the following columns: Application Number, Household, Application Type, Application Status, Most Recent Submission Date/Time, Agency, and Created Date/Time. The first row of the table is highlighted with a red box.

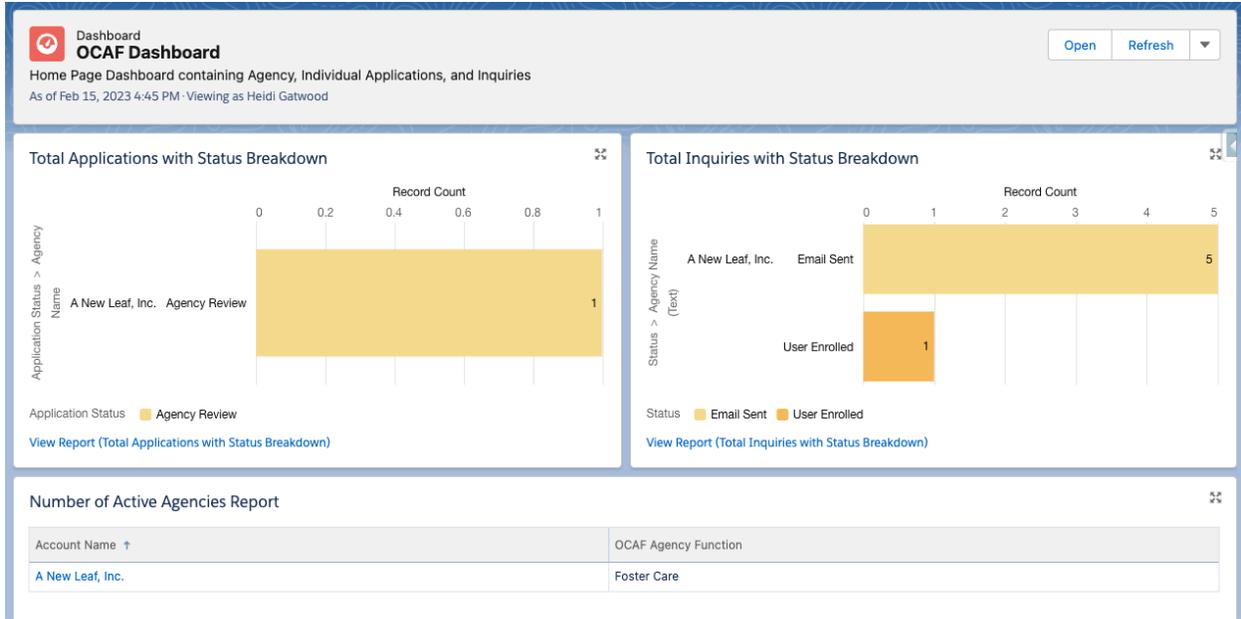
	Application Nu...	Household	Applicatio...	Application Stat...	Most Recent Submis...	Agency	Created Date
1	IA-0000000198	Stefany Household	Adoption	Withdrawn			2/14/2023 5:06 PM
2	IA-0000000190	Stefany Household	Adoption	Agency Review	2/14/2023 12:22 PM	Adoption Circle	2/14/2023 12:15 PM
3	IA-0000000184	Smith Household	Adoption	Agency Review	2/13/2023 5:43 PM	Adoption Circle	2/13/2023 11:35 AM

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

- **Application Number** – Clicking this blue hyperlink will navigate you into the Individual Application record
- **Household** - Clicking this blue hyperlink will navigate you to the Applicant's Household record
- **Application Type** - Each submitted application will have a designation for Foster Care, Foster Care and Adoption, or Adoption.
- **Application Status** – The system has multiple statuses which will indicate where in the process each application is:
 - **Agency review:** Application was submitted to your agency and needs to be reviewed for approval.
 - **Incomplete:** Your agency has reviewed the application and returned it to the applicant(s) as it was incomplete.
 - **Review Complete:** Your agency has reviewed the application and approved it. Your final approval of the application starts the clock for the Home Study to be completed.
 - **Withdrawn:** The applicant may withdraw an application if they choose not to move forward in applying or becoming licensed.
 - **Withdrawn - Closed by Agency:** The application was previously completed, but the applicant has decided to withdraw the application. Agency helped the Applicant Withdraw the already approved application.
- **Most Recent Submission Date/Time** – Documents the day and time when the application was last/most recently submitted.
- **Agency** – Indicates the Agency name the application was submitted to.
- **Created Date/Time** - Documents the day and time that the application was initially created by the applicant.

On the Home page, users will also find the **OCAF Dashboard** where the system displays high level Application and Inquiries statistics for their Agency. The dashboard visualizes the number of Applications and Inquiries within each status. To get more details about the application or inquiry, users can click on the View **Report** link under each of the widgets.

OCAF Agency User Guide



OCAF Agency User Guide

Accounts Tab

The **Accounts** tab will display active households that have submitted an application to your agency.

<input type="checkbox"/>	Account Name ↑	Household Number	Status	Mailing Street	Mailing City	Mailing State/Province	Mailing Zip/Postal ...
1	<input type="checkbox"/> 100 N Main St Household	H0000048288	New				
2	<input type="checkbox"/> 6288 Jeffrelyn Drive Household	H0000048309	Active	6288 Jeffrelyn Drive	Hilliard	Ohio	43026
3	<input type="checkbox"/> 666 Jeffrelyn Drive Household	H0000048316	Active	666 Jeffrelyn Drive	Hilliard	Ohio	43026
4	<input type="checkbox"/> 6699 Jeffrelyn Drive Household	H0000048318	Active	6699 Jeffrelyn Drive	Hilliard	Ohio	43026
5	<input type="checkbox"/> 699 Jeffrelyn Drive Household	H0000048320	Active	699 Jeffrelyn Drive	Hilliard	Ohio	43026

Individual Applications Tab

The **Individual Applications** tab displays a list of the applications submitted to your agency.

<input type="checkbox"/>	Application Number ↓	Household	Application Type	Application Status	Most Recent Submission Da...	Agency
1	<input type="checkbox"/> IA-0000000203	Smith Household	Adoption	Agency Review	2/15/2023 4:44 PM	A New Leaf, Inc.

Cases Tab

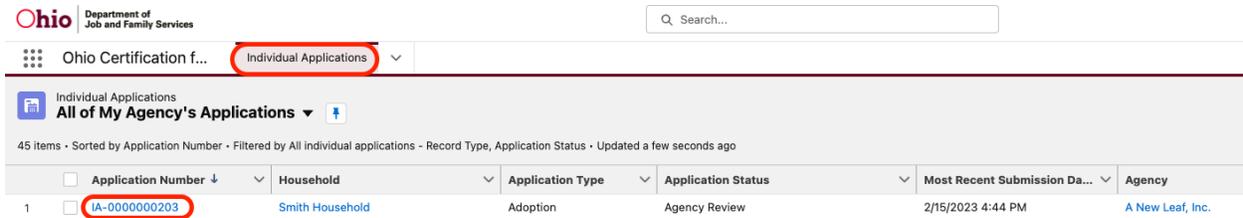
The **Cases** tab displays inquiries submitted online or by agency workers for your specific agency.

<input type="checkbox"/>	Case Number ↓	First Name	Last Name	Email	Agency Name
1	<input type="checkbox"/> 00642988	John	Doe	john.doe@sample.com	Adopt America Network (former Midwest)

OCAF Agency User Guide

Reviewing an Application

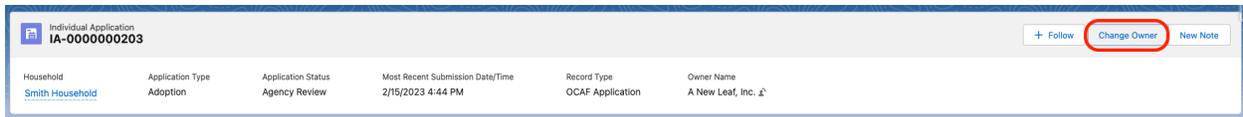
From the **Home** tab or the **Individual Applications** tab, click on the application number to open the submitted application.



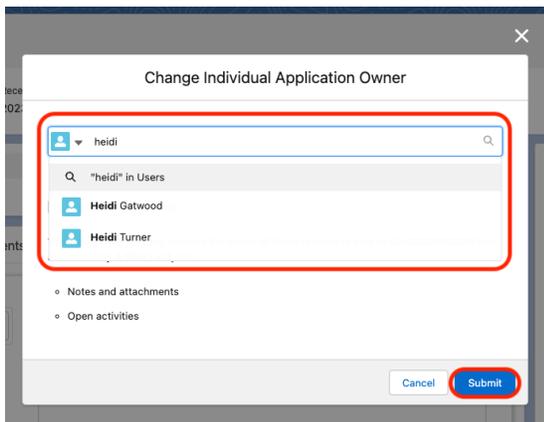
The Application's **Details** tab appears, along with a bar of additional tabs to guide you through the entire Application.

Assign the Application

Update the Ownership of the Application to assign for review. On top of the application page, click on the **Change Owner** button.



Search and select your name, or the name of the individual you wish to assign, and click **Submit**. The application is now successfully assigned.



OCAF Agency User Guide

Details

The **Details** Tab will contain **Household** information, **Agency** information, Applicant Signatures, and general submission information.

Details	Applicants	Household Members	Home Arrangements	Interest & Experience	References
Household				Application Status	
Smith Household				Agency Review	
Initial Submission Date/Time ⓘ				Reason withdrawn by Agency	
2/15/2023 4:44 PM					
Most Recent Submission Date/Time ⓘ				Agency	
2/15/2023 4:44 PM				A New Leaf, Inc.	
Date Application Review Completed				Application Type	
				Adoption	
Submission Count ⓘ				How were you Referred to Agency	
1					
All Applicant Names					
Charles Smith					
Directions to Your Home from Agency					
▼ Applicant Signatures					
Applicant 1 Signature				Applicant 4 Signature	
Applicant 1 Signature Name				Applicant 4 Signature Name	
Applicant 1 Signed Date				Applicant 4 Signed Date	

OCAF Agency User Guide

Applicants

Under the **Applicants** Tab, you will see background history of all applicants. By default, Applicant 1's section opens up. Click on each Applicant's accordion to expand their information. Each **Applicant's** tab will contain the following sections:

- Applicant
- Military History
- Criminal History
- Residential History
- Employment History
- Marital/Relationship History

Review each section for every Applicant. Each blue hyperlink below will navigate you to additional details entered by the respective Applicant.

Details **Applicants** Household Members Home Arrangements Interest & Experience References

▼ Applicant 1

Applicant 1 (1)

Applicant Name ↑	First Name	Last Name	Email Address	Cell Phone
A-000275	Charles	Smith	charles.smith@sample.com	(111) 111-1111

Military History (1)

Background History Name	Military Branch	Date Entered Military	Date Discharged	Type of discharge	Explanation for Other...
B-000880	Navy	2/1/2023	2/28/2023	Other	Example Other

Criminal History (1)

Background History ...	Offense	City of Offense	State of Offense	Convicted?	Date of Convictio...	Sentence
B-000879	Example Offense 1	Columbus	OH	Yes	2/1/2023	Sentence Example Here

Residential History (2)

OCAF Agency User Guide

Household Members

The **Household Members** Tab will display all Household Members, including their demographics and criminal history (if entered).

Review Household Member information. Each blue hyperlink below will navigate you to additional details entered for the household member.

Details Applicants **Household Members** Home Arrangements Interest & Experience References

Household Members (1)

Applicant Name	First Name	Last Name	Email Address	Cell Phone
A-000276	Jessica	Smith	jessica.smith@sample.com	

Criminal History (0)

No Records Found !

Home Arrangements

Under the **Home Arrangements** Tab, you will see information on **Sleeping Arrangements**, **Description of Home**, and **Vehicles**.

Review the Home Arrangement Information. Each blue hyperlink below will navigate you to additional details regarding the sleeping arrangement/room description.

Details Applicants Household Members **Home Arrangements** Interest & Experience References

Sleeping Arrangements (1) [New](#)

OCAF Sleeping Arrangement Name	Bedroom Number	Floor/Level	Occupant(s)
S-000112	1	Second	Charles

[View All](#)

Description of Home

Does any family member smoke? No	Is smoking allowed in the house? No
Are there any pets in the home? Yes	Description of Pet(s) Dog
Do pets meet local safety requirements? No	Explain if Safety Requirements not met Vaccination
Do you operate Business from residence? Yes	Adult/Child Care or Rooming House? Yes
Business Description Online Business	Business impact on Foster/Adopt Plan No Impact
Applicant(s) have living adult children? No	Willing to obtain Crib? Yes

Vehicles

Type of Vehicles One Car	
Are vehicles in operable condition? Yes	If Vehicle not Operable, please explain Not Applicable
Are there infant car seats? No	Are there toddler car seats? No
Name of Insurance Company All State	Proof of insurance for all vehicles? Yes
Access to Public Transportation?	If use: Mile to nearest Bus or Transit

OCAF Agency User Guide

Interest & Experience

Under **Interest & Experience** Tab, you will see the application details of **Type of Child Considered** and **Experience with Children** to review.

Details Applicants Household Members Home Arrangements **Interest & Experience** References

Type of Child Considered

Age Range	Number of children
12-15	Three or more
Gender	
Male;Female	
Are you applying for specific child?	Name of Specific Child
Yes	Jessica Stefany
Is Child related by Blood or Marriage?	Specify Relationship if Applicable
Yes	Previous Daughter

Experience with Children

Applied/Certified as Foster in any State	Applied/Approved to Adopt in any State
Yes	
Details of Previous Adoption/Foster	
Household Member apply/certify Foster	Household Member and Foster Agency
Yes	
Household Member apply/approve Adoption	Household Member and Adoption Agency
Yes	
Experience with Child Welfare Agencies?	Details of Child Welfare Experience
Yes	
Experience with Children (not your own)	

References

The **References** Tab will list Relative and Non-Relative **References** and **Adult Child References** if applicable.

Review the Reference Information. Each blue hyperlink will navigate you to additional details regarding the referent.

Details Applicants Household Members Home Arrangements Interest & Experience **References**

References (3)

OCAF References Name	Reference Name	Reference Type	Reference Relationship	Reference Email	Reference Phone
R-0000117	Person 1	Non-Relative Reference	Friend	person1@test.com	(319) 610-5066
R-0000118	Person 2	Non-Relative Reference	Friend	person2@test.com	(319) 610-5066
R-0000119	Person 3	Relative Reference	Brother	person3@test.com	(319) 610-5066

Adult Child References (1)

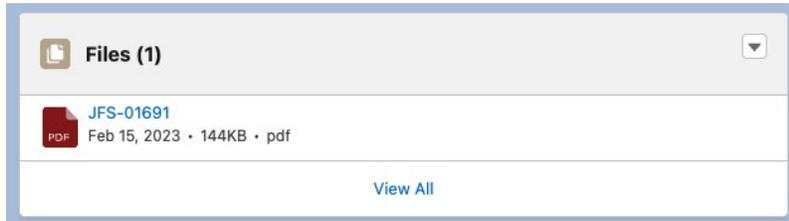
OCAF References Name	Reference Name	Adult Child Reference Relationship
R-0000120	Paddington Smith	Adoptive Child

OCAF Agency User Guide

Files

Additionally, an Agency Worker can find an Exported Application PDF (Form 01691) as well as supporting documents submitted by the applicant under **Files** on the right side of the application page.

To open the content of the application, click on the title of the document. A previewer will load the content within the system.



OCAF Agency User Guide

Approving/Returning an Application

After a full review of all the tabs and links in the application:

1. Return to the **Details** tab of the Application.
2. Click the pencil icon next to or double click the **Application Status** field.
3. Select the appropriate Status selection. The checkmark on the top bar will indicate the current status.
 - Choose **Incomplete** if there are things missing and you need applicant(s) to add more information. This will return the application to the applicant so they can complete your suggested requirements.
 - Alternatively, select **Review Complete** if, after review, all details are complete and accurate. This will lock the application and make it view only.

The screenshot displays the OCAF Agency User Guide interface. At the top, there is a header for 'Individual Application IA-000000203'. Below this, a table lists application details: Household (Smith Household), Application Type (Adoption), Application Status (Agency Review), Most Recent Submission Date/Time (2/15/2023 4:44 PM), Record Type (OCAF Application), and Owner Name (Heidi Gatwood). A progress bar at the top shows the current status as 'Agency Review' with a checkmark, and other statuses like 'Incomplete', 'Withdrawn', 'Review Complete', and 'Withdrawn - Closed by Ag...' are shown as disabled. Below the progress bar, the 'Details' tab is selected, and the 'Application Status' dropdown menu is open, showing options: '--None--', 'New', 'Agency Review' (selected with a checkmark), 'Incomplete', 'Withdrawn', 'Review Complete', and 'Withdrawn - Closed by Agency'. A 'Cancel' button is visible at the bottom of the dropdown menu.

4. After selecting your Status, click **Save**.
5. A system generated email will be sent to Applicant(s) based on the updated status. This will be the indicator to the applicant(s) of application status.



Thank you for submitting the following Child Placement Application:

- **Application Number:** IA-000000203
- **Application Type:** Adoption
- **Agency:** A New Leaf, Inc.
- **Date Application Submitted:** 2/15/2023 4:44 PM

The Agency listed above has reviewed your Application and determined it is "Incomplete".

The Agency will be contacting you soon for further information needed on your Application.

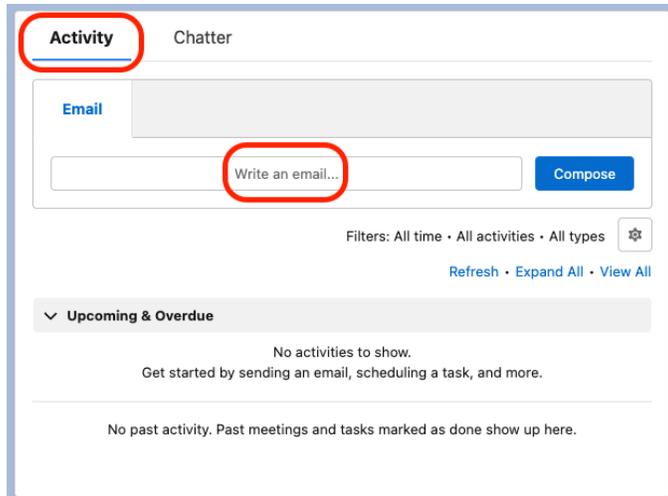
Click on this link to access your Application: <https://odjfs2-ocafomni.sandbox.my.site.com/OCAFApplicant>

6. Once the application has been marked as **Review Complete**, proceed in Ohio SACWIS with next steps to begin the Home Study process.

OCAF Agency User Guide

Sending an Email to Applicant(s)

1. From the Individual Application **Details** page, view the right side of the screen. There is a section for **Activity** and **Chatter**. Within the **Activity** tab, click where it says **Write an Email ...**



2. 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.



3. Enter the **Subject** of the email.
4. Enter details in the text of the email, such as missing items on the application, clarifying questions on the information entered, or next steps after you have reviewed the application.
5. Click **Send**. The emails will stay with this Application record within the system.

OCAF Agency User Guide

To: charles smith × Cc

Bcc

Subject: Recent Application was marked incomplete

Font Size B I U A- [Image] [Image] [Image] [Image]

Thank you for your submitted application.

After review, I will need more information from you on the application around your criminal history and any adult children you may have.

After you have revised, please return for agency review.

Thank you,
A New Leaf, Inc.

Related To: IA-0000000203 × Send

6. Click the **Home** tab to return to your list of applications.

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.