

Closing a Provider Record



Knowledge Base Article

Closing a Provider Record

Table of Contents

Overview	3
Preparing for Closure	3
Closing by Revocation.....	3
Checks in the Provider Record	3
Home Study	4
Approval/Certification.....	4
Final Steps	5
If Family Remains an Active Provider:.....	5
If Family Has No Other Active Provider Types:	5
Further Assistance.....	6

Closing a Provider Record

Overview

This article describes the steps that are needed to successfully close a Provider that has been licensed for fostering and/or approved for adoption.

If you are closing a Provider record prior to initial approval, follow the steps in the Knowledge Base Article: [Closing a Provider Without a Complete Home Study](#).

Preparing for Closure

Prior to starting a Provider Closing, users must make sure that appropriate paperwork from the family has been received for closure and/or documented clearly why the Provider must be closed. That may be:

- The completed JFS 1331 where the family indicates a decision to withdraw.
- Documentation of a phone call, conversation, or written notice you received from the family that they wish to close.

Note: If the family is refusing contact, you should document your attempts with activity logs.

Closing by Revocation

If you are revoking the Provider's license, you must have completed the Rules Violation, given the family ample opportunity to appeal/grieve the decision and contacted State staff as needed.

Information on completing a Rules Violation or Complaint can be found [here](#).

Checks in the Provider Record

Any work items that are pending and not completed will prevent closure. Navigate to the Provider record and complete the following steps under the following left-hand navigation links:

1. Ensure that there are no non-end-dated placements of youth in the Provider record under **Placement/Services**. A county agency may not have yet ended a placement record and may need a reminder to do so.
2. Check that all activity log records are in Completed status under the **Activity Log** link.
3. Verify there are no records in Pending status under the **Large Family Assessment** link.
4. Visit the **Rule Violation** link and ensure all records are in Completed status, any appeal periods have elapsed and State Hearings are concluded.
5. The **Waiver** link review should include making sure any existing waivers are end-dated.

Closing a Provider Record

6. Click the **Service Credentials** link, then click on the '**Other Services**' tab in the middle. Deactivate or delete any placement or other services that may have been added by other counties/users.

Home Study

You will need to complete a closing amendment for each home study type (foster and adoptive). This can be done quickly:

1. Select the '**copy**' link next to the most recent home study record for each open Provider Type.
2. Indicate a Home Study Type of **Amend**.
3. Document in the **Amendment/Update** section that you are closing the Provider in the **Comments** section and check all reasons which apply.
4. You may document closing information within the home study document as you wish or as required by your agency. Alternatively, you may proceed directly to the **Recommendation** link at this point and enter a Recommendation of '**Close**' and then a **Primary Reason** as to why. Click **Save**.
5. From the **Home Study Topics** list page, select '**Validate for Approval**', correct any errors and then route the home study for approval or mark as 'Approved-Final', depending on your security.

Approval/Certification

Create a closing **Approval/Certification** record for each Provider Type.

1. Proceed to **Approval/Certification** link on the left-hand navigation.
2. Click the '**Add Recommendation**' button.
3. Choose an **Agency Contact Person, Recommendation Date, Provider Type** and choose the value of '**Close**' in the **Transaction** drop-down.
4. Select a '**Closed Reason**' under the **Close Transaction Information** section.
5. Click '**Process Approval**'. Closures for Foster Care records should be routed to the State licensing representative at the Ohio Department of Job and Family Services/Department of Children and Youth (the first agency listed in the Agency drop-down, not in alphabetical order). The Adoptive closures can be approved by an individual within the agency.
6. Once Approval/Certification(s) record(s) have been approved, the system should have end-dated the Provider Types and Provider Type statuses and ODJFS Approved Services. Verify both by clicking the **Provider Overview > Provider Information** and the **Service Credentials** links. If any active ODJFS Approved Services or open Provider Types for your Agency remain, please repeat the steps above to close the Provider Type(s).

Closing a Provider Record

Final Steps

If Family Remains an Active Provider:

If the family remains open with another agency (is an active Kinship provider, is approved by another adoption agency, etc.), you will not close the Provider Status. Instead, you will want to simply end date your assignments.

Critical Point: Do **NOT** end your Agency assignments to the Provider unless you have verified this family will continue to hold an active Provider Type with another agency and you've confirmed that all the Provider Types owned by your Agency are now closed. Otherwise, your agency will continue to be assigned to and 'own' this Provider ID but will not have any employee assignments with the ability to edit the Provider record.

To end assignment(s) (to be completed by an Agency supervisor):

1. Click the **Home** tab.
2. Click the **Assignments** sub-tab.
3. Expand the assignments for yourself or the worker assigned to the provider.
4. Click the **edit** link next to the Provider Name/ID.
5. Enter an **End Date** for Employee Assignment. Repeat this for yourself and any other workers assigned by your Agency for this Provider ID.

If Family Has No Other Active Provider Types:

If there are no other open Provider Types active with any other agency for this family, the last step in the Closing process is to close the **Provider Status**.

Critical Point: Failure to close the **Provider Status** means that the Home provider remains in Active status and reflects as open with your Agency. If assignments are ended manually without closing the Provider Status, your Agency will be reflected as owning this Provider record without any ability to edit the record.

1. Navigate to the **Provider Overview > Provider Information** hyperlink.
2. Scroll down to the **Provider Status Information** section
3. Select '**Closed**' from the **Provider Status** drop-down and click '**Add Status**'.
4. Enter an **Effective Date**, any comments and then click '**OK**'.
5. Click **Save** upon return to the **Provider Information's** Basic tab.
6. The record should now reflect a status of Closed and all assignments for your Agency are automatically end-dated. The Provider ID should no longer show on your Workload.

Closing a Provider Record

Further Assistance

If you need additional information or assistance, or encounter an error you cannot resolve by repeating the steps in this article, please contact the Automated Systems Help Desk at SACWIS_HELP_DESK@childrenandyouth.ohio.gov .