

Accessing Agency Account and Staff Personnel Information



Knowledge Base Article

Accessing Agency Account and Staff Personnel Information

Table of Contents

| | |
|--|----|
| Overview..... | 3 |
| Getting Started..... | 3 |
| MyOhio Access..... | 3 |
| Helpful Hints About the OCAF System..... | 4 |
| Navigating OCAF..... | 5 |
| Home Tab..... | 5 |
| Accounts Tab..... | 5 |
| Viewing your Agency..... | 6 |
| Adding a New Contact..... | 11 |
| Editing a Contact..... | 15 |
| Contacts Tab..... | 16 |
| Background Checks Tab..... | 18 |
| Create a New Background Check..... | 19 |

Accessing Agency Account and Staff Personnel Information

Overview

This article describes how to access your Agency Account information, view, and add Personnel Information, and submit a background check within the Ohio Certification for Agencies and Families (OCAF) system.

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 and the role(s) you serve within that agency:

| 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 |
| EIDMX_JFS_S - OCAF Agency Board President | Private Agency |
| EIDMX_JFS_C - OCAF Agency Director | Public Agency |
| EIDMX_JFS_S - OCAF Agency Administrator | Private Agency |
| EIDMX_JFS_C - OCAF Agency Administrator | Public Agency |
| EIDMX_JFS_S - OCAF Agency Supervisor | Private Agency |
| EIDMX_JFS_C - OCAF Agency Supervisor | Public Agency |
| EIDMX_JFS_S - OCAF OHMAS | Private Agency |
| EIDMX_JFS_S - OCAF Home Study Assessor | Private Agency |
| EIDMX_JFS_C - OCAF Home Study Assessor | Public Agency |
| EIDMX_JFS_S - OCAF Branch/Facility Supervisor | Private 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. A link to the 7078 Form can be accessed by clicking the link below:

[JFS 7078 Form](#)

MyOhio Access

After the user is properly provisioned for access to OCAF, begin by accessing MyOhio using your SUID and your password. Navigate to the My Apps through My Workspace. Locate and click on the tile for JFS Salesforce Apps.

Accessing Agency Account and Staff Personnel Information

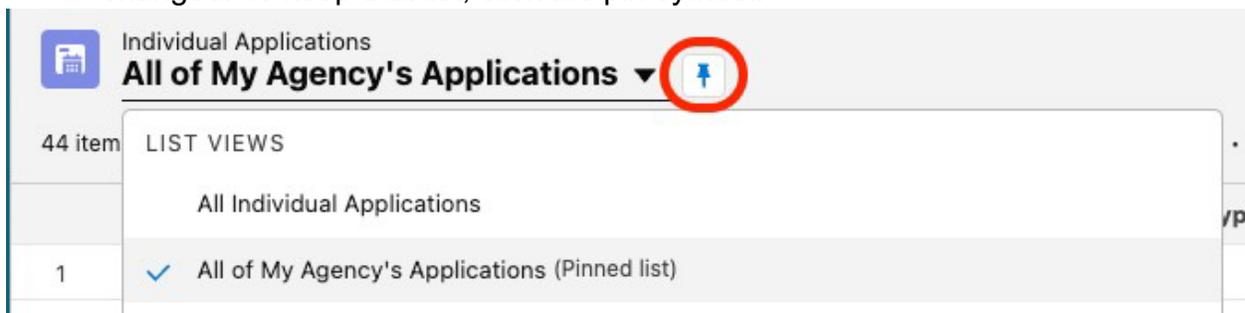


Helpful Hints About the OCAF System

- If you have other Salesforce applications, please use the app launcher to navigate to OCAF.



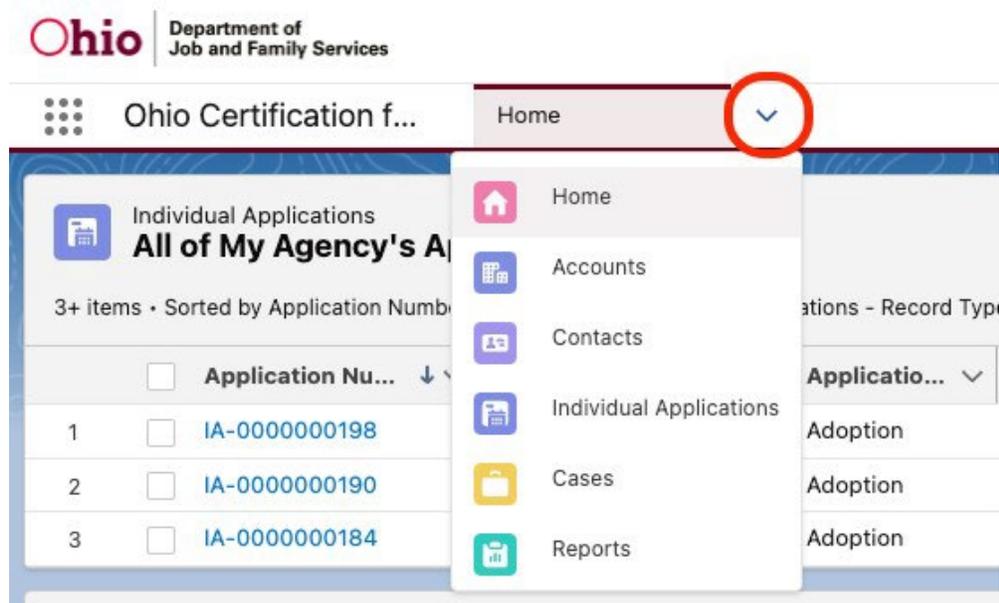
- You may use the web browser back arrow button to return to the previous screen or navigate between record tabs within Salesforce.
- All items in blue font contain a hyperlink to something else. Click on it to navigate to the corresponding information page.
- The **Home** dropdown menu contains a list 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.



Accessing Agency Account and Staff Personnel Information

Navigating OCAF

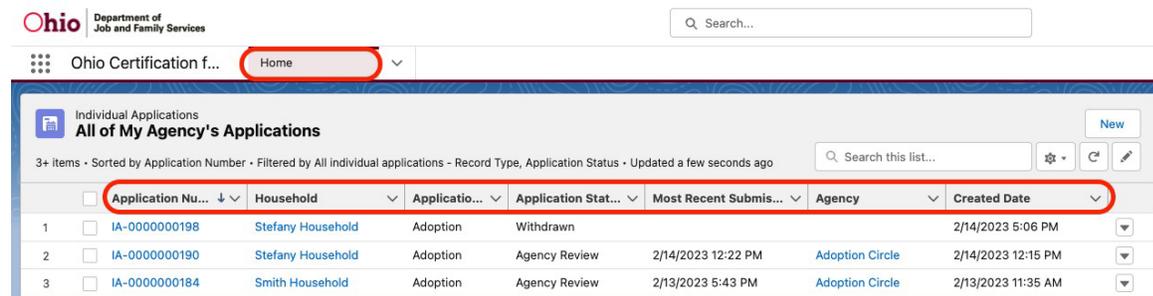
After logging into the system, the tabs at the top will guide you through the different work items in OCAF.



Home Tab

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

The list of **Child Placement Applications** (commonly known as the JFS 01691) submitted to your agency.

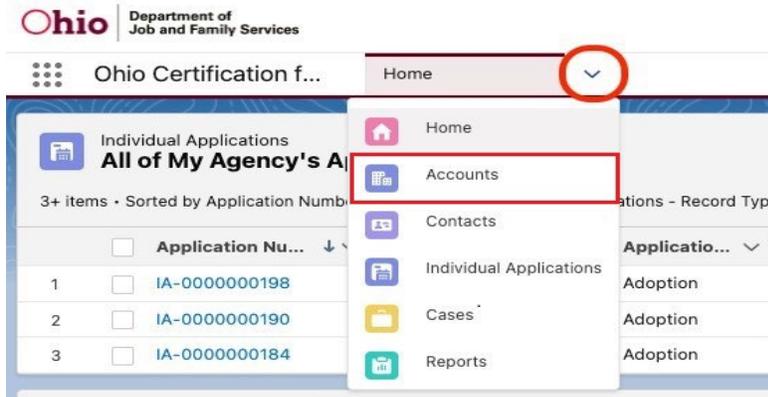


Accounts Tab

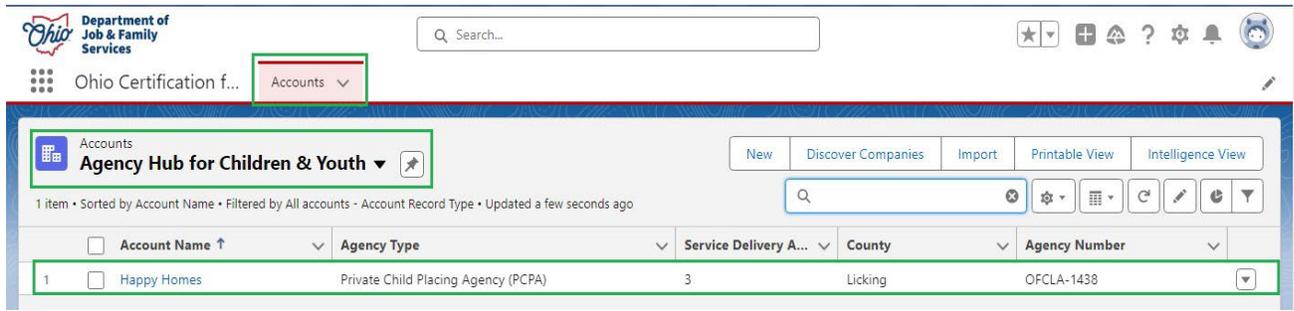
The **Accounts** tab will display your **Agency Account**. Here is where you can **View** and **Edit** your agency and **Add Contacts**.

1. From the **Home** dropdown menu, select **Accounts**.

Accessing Agency Account and Staff Personnel Information

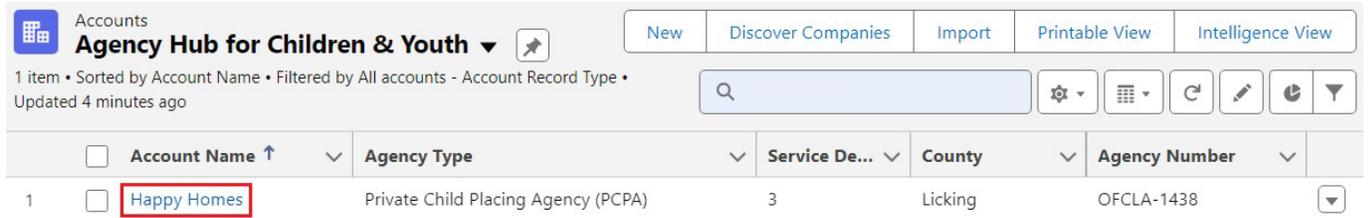


The **Accounts** screen appears displaying your **Account Name**, **Agency Type**, **Service Delivery Area**, **County** and **Agency Number**. See below:



Viewing your Agency

1. To view your **Agency Information**, click the **Account Name** link.



Your **Account** screen appears, displaying all of your **Account Information**. The screen defaults to the **Details Tab**.

Accessing Agency Account and Staff Personnel Information

 Account
Happy Homes 

[+ Follow](#) [New Event](#) [New Note](#) [Sharing](#)

| | | | |
|-------------------------------------|-----------|---------|-------------------|
| Agency Type | Certified | County | Agency Email |
| Private Child Placing Agency (PCPA) | | Licking | testing@gmail.com |

Details Related

Agency Email
testing@gmail.com 

Beginning of Continuous Certification 
1/1/2024 

Accreditation Agency
Healthy Families America 

Accreditation Date
1/1/2024 

4. Children's Crisis Care Facilities
 

5. Residential Infant Care Center(s)
 

Activity Chatter

Filters: All time • All activities • All types 

[Refresh](#) • [Expand All](#) • [View All](#)

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

Note: The  icon indicates those fields are **Editable**.

Accessing Agency Account and Staff Personnel Information

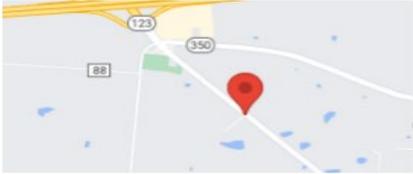
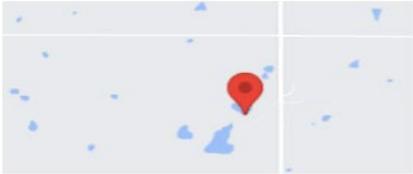
▼ Agency Information

| | |
|--|--|
| Agency Number OFCLA-1438 | Account Record Type Agency Hub for Children & Youth |
| Account Name Happy Homes | Account Owner Lisa Oliver |
| Agency Acronym | Active in PCSA Exit Survey <input type="checkbox"/> |
| Agency Type Private Child Placing Agency (PCPA) | Accepts Adoption/Foster Apps & Inquiries <input type="checkbox"/> |
| Service Delivery Area (SDA) 3 | Active in TEAM Ohio <input type="checkbox"/> |
| Fiscal Year | Restricted ⓘ <input type="checkbox"/> |
| Fiscal Starting Month | Is this an adoption agency? ⓘ <input type="checkbox"/> |
| Fiscal Ending Month | OCAF Licensing Region |
| Phone ⓘ | Exit Survey Region |
| Fax | Size of PCSA |
| Inquiry Primary Email ⓘ | Parent Account |
| Agency Description Test Narrative. Happy Homes provides residential care for children since 1/2024. | Inquiry Secondary Email ⓘ |

▼ Additional Visit Dates

| | |
|-------------------------------|---------------------------|
| Additional Visit Start Date ⓘ | Additional Visit End Date |
| | |

▼ Address

| | |
|-------------------|--|
| County Licking | Business Address 123 Happy St Test, Ohio 12345 United States |
| |  |
| | Mailing Address United States |
| |  |

Accessing Agency Account and Staff Personnel Information

| ▼ Agency Certification | |
|--|--|
| Certified ⓘ | Beginning of Initial Certification Span ✎ |
| Certification Status ⓘ | End of Initial Certification Span ⓘ |
| Closure Type ✎ | Closure Date ✎ |
| ▼ QRTP Compliance | |
| QRTP Compliant ✎ | QRTP Compliance Effective Date ✎ |
| QRTP Comments ⓘ ✎ | QRTP Compliance End Date ✎ |
| ▼ Functions | |
| 1. Children's Residential Center(s) <input type="checkbox"/> ✎ | 8. Pre-adoptive Infant FH Certification <input type="checkbox"/> ✎ |
| 2. Group Home(s) <input type="checkbox"/> ✎ | 9. Custody of Children <input type="checkbox"/> ✎ |
| 3. Residential Parenting Facilities <input type="checkbox"/> ✎ | 10. Place Children <input type="checkbox"/> ✎ |
| 3. Residential Parenting Facility (GH) <input type="checkbox"/> ✎ | 11. Participate in Placement FH <input type="checkbox"/> ✎ |
| 4. Independent Living Arrangements <input type="checkbox"/> ✎ | 12. Participate in Placement Adopt <input type="checkbox"/> ✎ |
| 5. Family FH Certification <input type="checkbox"/> ✎ | 13. CCCF (CRC) <input type="checkbox"/> ✎ |
| 6. Treatment Foster Home Certifications <input type="checkbox"/> ✎ | 13. CCCF (GH) <input type="checkbox"/> ✎ |
| 7. Medically Fragile Foster Homes Cert <input type="checkbox"/> ✎ | 14. PNTWC <input type="checkbox"/> ✎ |
| ▼ System Information | |
| Created By Lisa Oliver , 4/1/2024 1:06 PM | Last Modified By Lisa Oliver , 4/1/2024 1:08 PM |
| ▼ SACWIS Information | |
| SACWIS Agency ID ✎ | Public Agency <input type="checkbox"/> ✎ |
| SACWIS Party ID ✎ | COA <input type="checkbox"/> ✎ |
| SACWIS Phone Ext ✎ | Inactive <input type="checkbox"/> ✎ |
| SACWIS Home Phone Ext ✎ | CWLA <input type="checkbox"/> ✎ |

You can **Edit** any fields marked with **Edit Icon** on this page at any time.

Accessing Agency Account and Staff Personnel Information

2. Click the **Related** Tab.

The screenshot shows the 'Details' tab selected. The 'Related' tab is highlighted with a red box. The interface includes a header with the account name 'Happy Homes', a '+ Follow' button, and buttons for 'New Event', 'New Note', and 'Sharing'. Below the header, agency information is displayed: Agency Type (Private Child Placing Agency (PCPA)), Certified status, County (Licking), and Agency Email (testing@gmail.com). The main content area shows 'Agency Email' (testing@gmail.com) and 'Beginning of Continuous Certification' (1/1/2024), both with edit icons. On the right, the 'Activity' tab is selected, showing filters for 'All time', 'All activities', and 'All types', along with 'Refresh', 'Expand All', and 'View All' options.

The **Related** Tab screen appears displaying **Account History, Contacts, Cases, Individual Applications, Files** and **Living Units**.

The screenshot shows the 'Related' tab selected. The 'Details' tab is also visible. The 'Related' tab content includes a message: 'We found no potential duplicates of this Account. No duplicate rules are activated. Activate duplicate rules to identify potential duplicate records.' Below this, there are several sections: 'Account History (2)' with a table of changes, 'Contacts (0)', 'Cases (Agency Name) (0)', 'Individual Applications (0)', 'Files (0)' with an 'Upload Files' button and a drop zone, and 'Living Units (0)'. The 'Activity' tab on the right shows 'Upcoming & Overdue' with no activities to show.

| Date | Field | User | Original Value | New Value |
|------------------|----------|-------------|----------------|-----------|
| 4/1/2024 1:08 PM | County | Lisa Oliver | | Licking |
| 4/1/2024 1:06 PM | Created. | Lisa Oliver | | |

Accessing Agency Account and Staff Personnel Information

Adding a New Contact

1. Within the **Contacts** section, click the **New** button.

Ohio Certification f... Accounts

Account **Happy Homes**

+ Follow New Event New Note Sharing

Agency Type Private Child Placing Agency (PCPA) Certified County Licking Agency Email testing@gmail.com

Details **Related**

We found no potential duplicates of this Account.
No duplicate rules are activated. Activate duplicate rules to identify potential duplicate records.

Account History (2)

| Date | Field | User | Original Value | New Value |
|------------------|---------|-------------|----------------|-----------|
| 4/1/2024 1:08 PM | County | Lisa Oliver | | Licking |
| 4/1/2024 1:06 PM | Created | Lisa Oliver | | |

View All

Contacts (0) **New**

A box appears requiring a **New Contact Record Type**.

2. Select **Personnel for Children & Youth** for the **Contact Type**.
3. Click the **Next** button.

New Contact

Select a record type.

- Case OFC Policy HelpDesk
- APS Contact
- Agency Administrator
Agency Administrator - Foster Care Licensing
- Board Member
Board Member - Foster Care Licensing
- Case Management
Case_Management
- Community User Contacts
Used for the Community User Contacts ONLY
- DRMS Media Reporter
Media Reporter List for DRMS Communications Team
- OCAF Agency Contact
- OCAF Applicant
- OFA-CCIDS Contact Layout
OFA-CCIDS Contact Layout
- OFC Customer Care Center Contact
Contact record type for OFC Customer Care Center
- OWD Contact
Contact record type for OWD CRM
- Personnel for Children & Youth**
Personnel for Children & Youth

Cancel **Next**

Accessing Agency Account and Staff Personnel Information

A box appears requiring you to fill out the **Personnel Information** for the **New Contact**.

New Contact: Personnel for Children & Youth

* = Required Information

Personal Information

*** Name**

Salutation
--None--

First Name
First Name

Middle Name
Middle Name

*** Last Name**
Last Name

Complete this field.

Suffix
Suffix

*** Phone**

*** Email**

Mailing Address

Search Address

Mailing Country
United States

Mailing Street

Mailing City
Mailing State/Province
--None--

Mailing Zip/Postal Code

*** County**
--None--

*** Account Name**
Happy Homes

1. Provide the New Contacts **First** and **Last Name**.
2. Provide **Phone Number**.
3. Provide **Email**.
4. Fill out **Address**.
5. Make a selection from the **County** dropdown menu.
6. **Account Name** is auto filled with your Account Name.

Demographic Information

*** Date of Birth**

Race
--None--

*** Gender**
--None--

*** Ethnic Background (Hispanic/Latino)**
--None--

Employment Information

*** Agency Job Title**
--None--

*** Employment Type**
--None--

Job Description

Federation/OH ID

*** Hire Date**

End of Employment Date

Ohio SACWIS Employee ID

Ohio SACWIS Person ID

Accessing Agency Account and Staff Personnel Information

7. Fill out the **Date of Birth** field.
8. Make a selection for **Gender** from the dropdown menu.
9. Make a selection for **Ethnic Background** (Hispanic/Latino).
10. Make a selection for **Agency Job Title**.
11. Make a selection for **Employment Type**.
12. Fill out the **Date of Hire** field.

Additional Background Search Dates

National Sex Offender Search Date

Findings of Recovery Search Date

Ohio Alleged Perpetrator Search Date

SAMS Search Date

Additional AP Search Required?

Contact Record Type
Personnel for Children & Youth

Contact Owner
Lisa Oliver

Cancel Save & New Save

13. Click the **Save** button. **OR**
14. If adding more than one **New Contact**, you may click the **Save & New** button to create another contact within your Agency.

Note: All fields marked with an * are required.

A **Validation Message** will appear verifying your **New Contact** has been created.



Within the **Related Tab** you will now see your **New Contact** listed.

Note: After save, the contact screen will open in a new tab right next to your related tab. It will be the new contact you just entered. See image below. You can click on the account name related tab to return to your previous screen.

Accessing Agency Account and Staff Personnel Information

Choosing Hope ... Frank Sin... ▾ ×

Contact
Mr. Frank Sinatra

Agency Job Title: Supervisor Phone: (456) 789-1230 County: Carroll

Details **Background Checks** Personnel History

Background Checks (0)

Click on the **Account Name** to return to the **Related Tab**.

Details **Related**

We found no potential duplicates of this Account.
No duplicate rules are activated. Activate duplicate rules to identify potential duplicate records.

Account History (2)

| Date | Field | User | Original Value | New Value |
|------------------|----------|-------------|----------------|-----------|
| 4/1/2024 1:08 PM | County | Lisa Oliver | | Licking |
| 4/1/2024 1:06 PM | Created. | Lisa Oliver | | |

[View All](#)

Contacts (1) New

Stephanie Salesforce ▾
OFCL...
OFCL...
Cont... Personnel for Childr...

[View All](#)

Accessing Agency Account and Staff Personnel Information

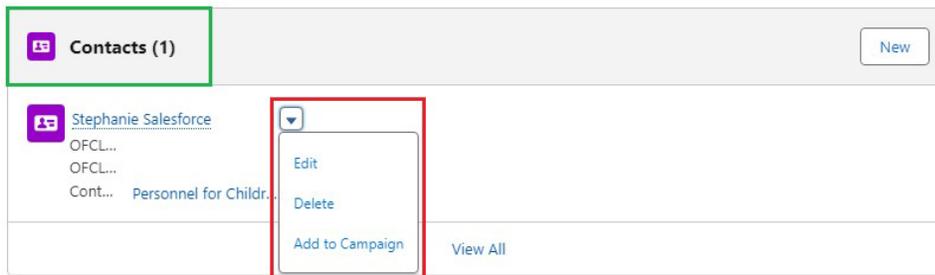
Editing a Contact

Once your **New Contact** is created, you may **Edit** at any time.

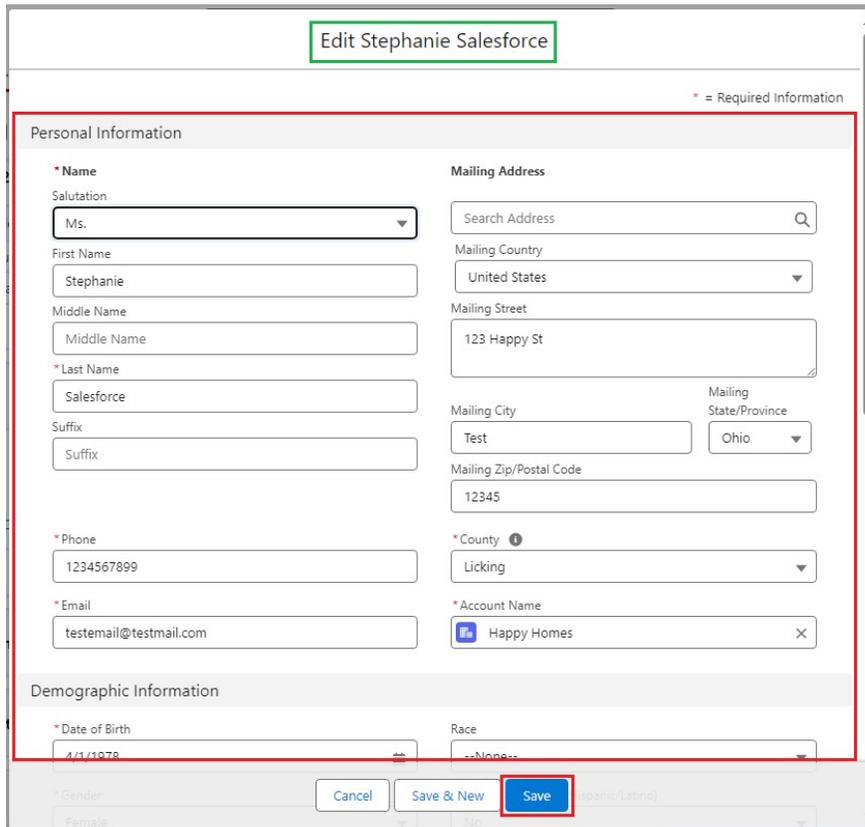
1. From the **Related Tab**, click the **dropdown** button next to the appropriate **Contact**.

Note: You can select **Edit**, **Delete** or **Add to Campaign**.

2. Select **Edit**.



A box appears displaying the **Contacts Personnel Information**.

A screenshot of a form titled 'Edit Stephanie Salesforce'. The form is divided into sections: 'Personal Information' and 'Demographic Information'. The 'Personal Information' section includes fields for Name (Salutation: Ms., First Name: Stephanie, Middle Name, Last Name: Salesforce, Suffix), Mailing Address (Search Address, Mailing Country: United States, Mailing Street: 123 Happy St, Mailing City: Test, Mailing State/Province: Ohio, Mailing Zip/Postal Code: 12345), Phone (1234567899), Email (testemail@testmail.com), and Account Name (Happy Homes). The 'Demographic Information' section includes Date of Birth (4/1/1978) and Race (None). There are 'Cancel', 'Save & New', and 'Save' buttons at the bottom. A legend indicates that an asterisk (*) denotes required information.

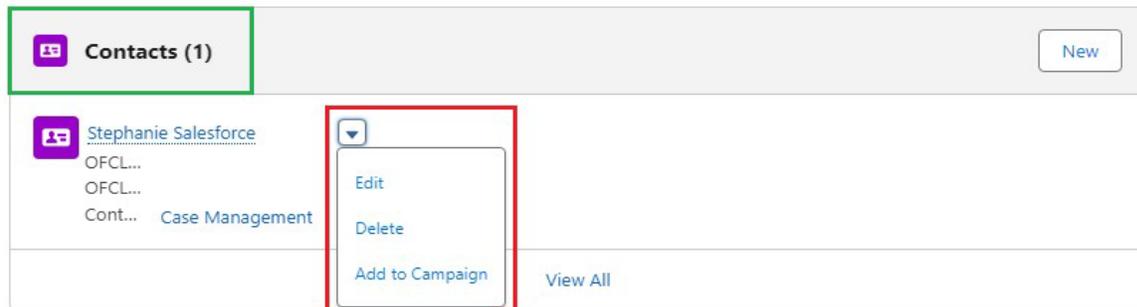
3. When done **Editing**, click the **Save** button.

Accessing Agency Account and Staff Personnel Information

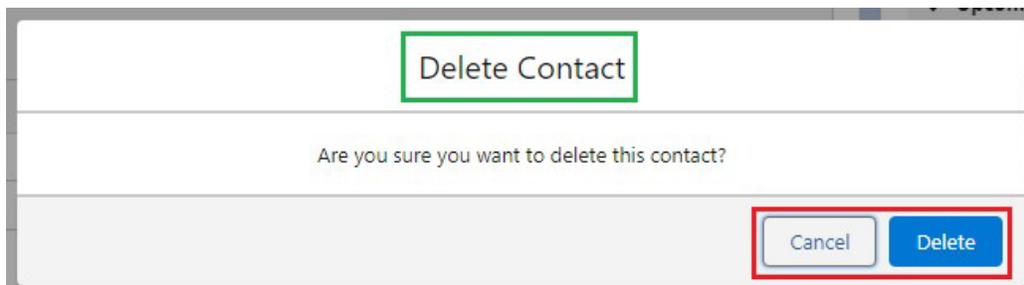
A **Validation Message** will appear verifying the contact was **Saved**.



4. If you need to **Delete** the **Contact**, select **Delete** from the **dropdown** menu.



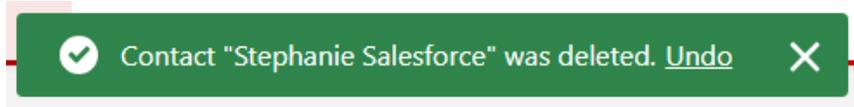
A box will appear verifying if you want to **Delete** the **Contact**.



5. Click **Delete** to permanently **Delete** the **Contact** from your Agency. **OR**

6. Click the **Cancel** button to exit out the Delete Contact Box.

A **Validation Message** will appear verifying the **Contact** was **Deleted**.



Contacts Tab

The **Contacts Tab** will display the **Names**, **Contact Email**, **Account Name** and **Person ID** for **Personnel** listed within **Your Agency**. You have the option to add new contacts to your agency from this tab as well as from the Accounts tab. (Previously Reviewed)

1. From the **Home** dropdown menu, select **Contacts**.

Accessing Agency Account and Staff Personnel Information

The screenshot shows the Ohio Department of Job and Family Services interface. The top navigation bar includes the Ohio logo and the text "Department of Job and Family Services". Below this, there is a "Home" button with a dropdown arrow, which is circled in red. A dropdown menu is open, showing options: Home, Accounts, Contacts (highlighted with a red box), Individual Applications, Cases, and Reports. The main content area shows a list of "Individual Applications" with columns for "Application Number" and "Application Number".

The **All Agency Personnel Contacts** screen appears.

The screenshot shows the "All Agency Personnel Contacts" screen. The top navigation bar includes the Ohio logo and the text "Department of Job and Family Services". Below this, there is a "Contacts" button with a dropdown arrow, which is highlighted with a green box. The main content area shows a list of "All Agency Personnel Contacts" with columns for "Account Name", "Name", "Agency Job Title", "Hire Date", "End of E...", "Phone", and "Email".

| Account Name | Name | Agency Job Title | Hire Date | End of E... | Phone | Email |
|--------------|----------------------|---------------------|-----------|-------------|------------|------------------------|
| Happy Homes | Stephanie Salesforce | Agency Director | 4/1/2024 | | 1234567899 | testemail@testmail.com |
| Happy Homes | Susie Sacwis | Administrator | 3/4/2024 | | 1234567890 | testing@testemail.com |
| Happy Homes | Tim Testing | Staff Administrator | 4/2/2019 | | 1234567897 | testingemail@email.com |

2. To **Edit** any information on a contact, click the dropdown arrow on the right hand side and select **edit**.
3. You can click the dropdown button at the end of the grid to **Edit**, **Delete** or **Change Owner** for the **Contact**. Shown in red above.
4. You can **Add** a **New Contact** directly from this page by clicking the **New** button.
5. You can **View and edit** the **Contacts Personnel Information** by clicking the **Name** link.

The screenshot shows the "All Agency Personnel Contacts" screen. The top navigation bar includes the Ohio logo and the text "Department of Job and Family Services". Below this, there is a "Contacts" button with a dropdown arrow, which is highlighted with a green box. The main content area shows a list of "All Agency Personnel Contacts" with columns for "Account Name", "Name", "Agency Job Title", "Hire Date", "End of E...", "Phone", and "Email". The "Name" column is highlighted with a red box.

| Account Name | Name | Agency Job Title | Hire Date | End of E... | Phone | Email |
|--------------|----------------------|---------------------|-----------|-------------|------------|------------------------|
| Happy Homes | Stephanie Salesforce | Agency Director | 4/1/2024 | | 1234567899 | testemail@testmail.com |
| Happy Homes | Susie Sacwis | Administrator | 3/4/2024 | | 1234567890 | testing@testemail.com |
| Happy Homes | Tim Testing | Staff Administrator | 4/2/2019 | | 1234567897 | testingemail@email.com |

Accessing Agency Account and Staff Personnel Information

You will be taken to the **Background Checks** screen and can **add Background checks from here.**

You can also then click on the **Details** tab to edit any information about the **contact.**

Contact: **Ms. Stephanie Salesforce**

Change Record Type Edit Delete

Agency Job Title: Agency Director | Phone: (123) 456-7899 | County: Licking

Details | Related

Personal Information

Name: Ms. Stephanie Salesforce

Mailing Address: 123 Happy St, Test, Ohio 12345, United States

Phone: (123) 456-7899 | County: Licking

Email: testemail@testmail.com | Account Name: Happy Homes

Demographic Information

Activity

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No activities to show.

Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

Background Checks Tab

The **Background Checks** tab allows you to submit a **Background Check** request for **New Contacts, New Employees in Your Agency.**

1. From the **Contacts** screen, click on the **Name** to access the **Background check** tab.

Contacts: **All Agency Personnel Contacts**

New Intelligence View Import Printable View

3 items • Sorted by Account Name • Filtered by All contacts - Contact Record Type • Updated 4 minutes ago

| <input type="checkbox"/> | Account Name ↑ | Name | Agency Job Title | Hire Date | End of E... | Phone | Email |
|--------------------------|----------------|----------------------|---------------------|-----------|-------------|------------|------------------------|
| <input type="checkbox"/> | Happy Homes | Stephanie Salesforce | Agency Director | 4/1/2024 | | 1234567899 | testemail@testmail.com |
| <input type="checkbox"/> | Happy Homes | Susie Sacwis | Administrator | 3/4/2024 | | 1234567890 | testing@testemail.com |
| <input type="checkbox"/> | Happy Homes | Tim Testing | Staff Administrator | 4/2/2019 | | 1234567897 | testingemail@email.com |

The **Screen** defaults to the **Background checks** Tab for that contact.

Accessing Agency Account and Staff Personnel Information

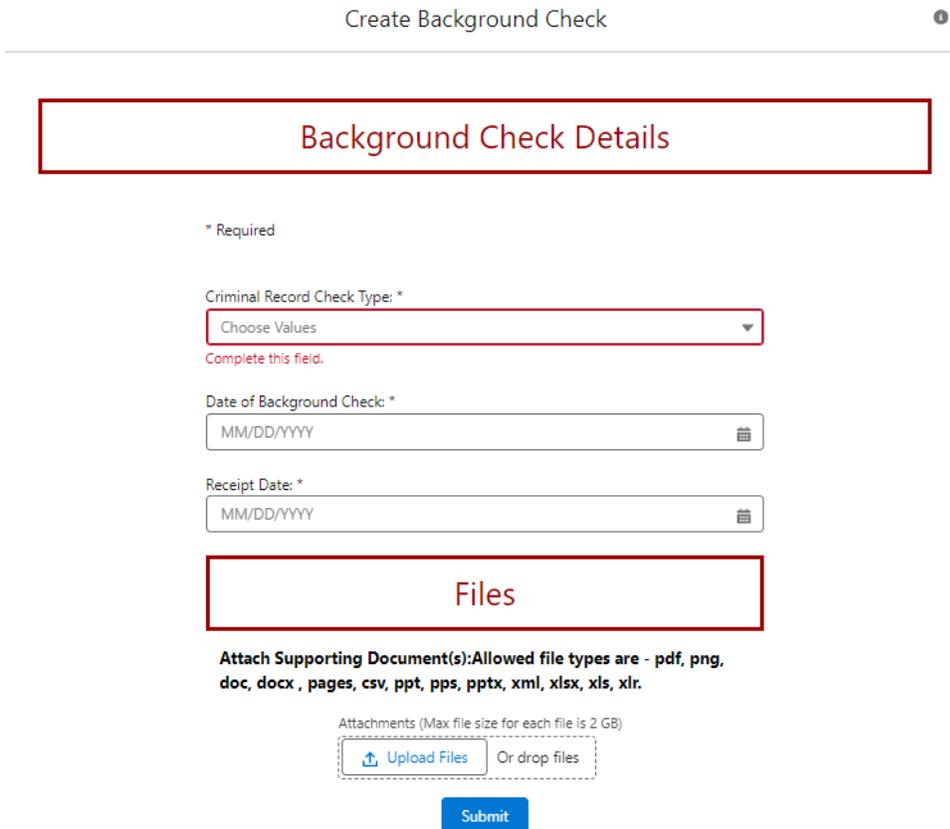


Create a New Background Check

1. Click the **Create background Check** button on the **Background Checks** screen.



A box appears requiring you to fill out information for the **Background Check**.



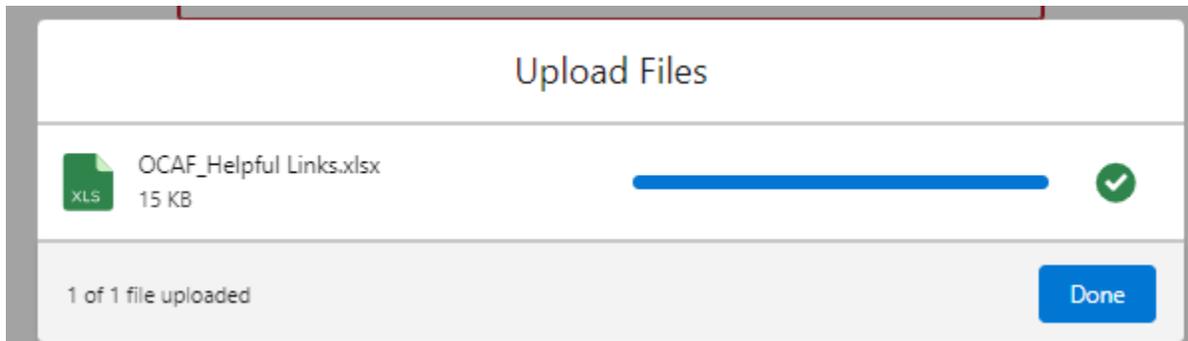
2. Make a selection for the **Criminal Record Check Type** dropdown box.

Accessing Agency Account and Staff Personnel Information

3. Select the date the Background Check was completed in the **Date of Background Check**.

Type the date you received the **Background Check** into the **Receipt Date Box**

4. Click on the **Upload Files** button.
5. Find the correct **Background Check** on your computer that you wish to upload for this contact.
6. Click **Open** to start the upload.
7. Once upload is completed, select the **Done** button.



8. Scroll down to select the **Submit** button.

You will receive a message on your screen that the **Background Check** record was uploaded successfully. Click **Close**.

To enter another **Background Check**, follow same steps. To close that Contact, click the **X** next to the Contact Name in top tab bar.

If you need additional information or assistance, please contact the JFS DCY Customer Care Center at <https://odjfs2.my.site.com/CustomerCareCenter> .