

# Completing a Policy, Plan and Document Revision - Agency



**Knowledge Base Article**

# Completing a Policy, Plan and Document Revision - Agency

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# Completing a Policy, Plan and Document Revision - Agency

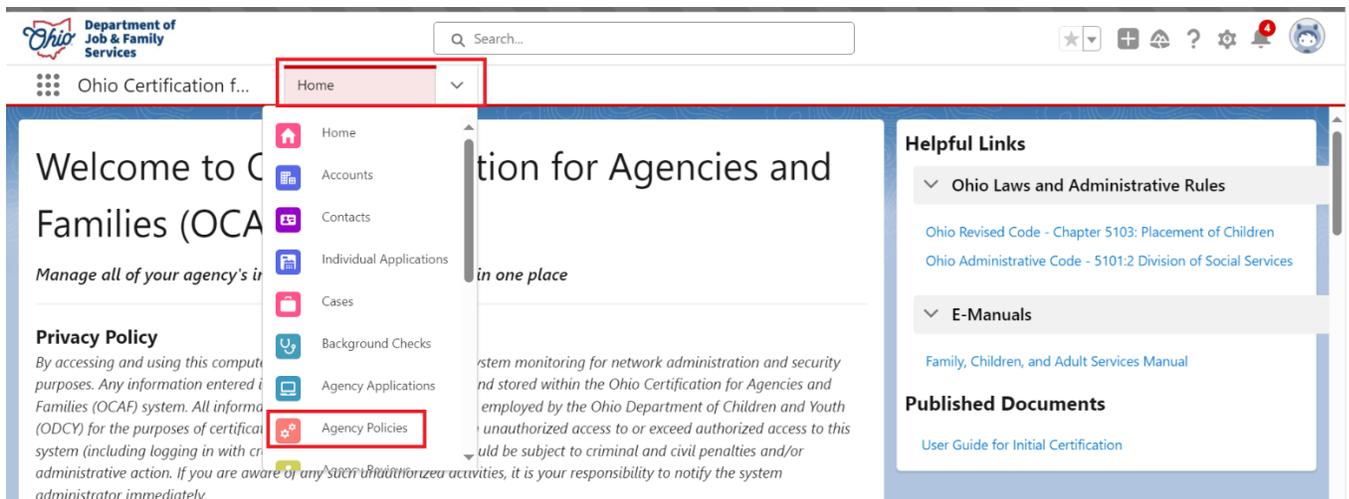
## Overview

This user guide describes how to complete a Policy Revision as an Agency Administrator in the Ohio Certification for Agencies and Families (OCAF) system.

## Functionality Location

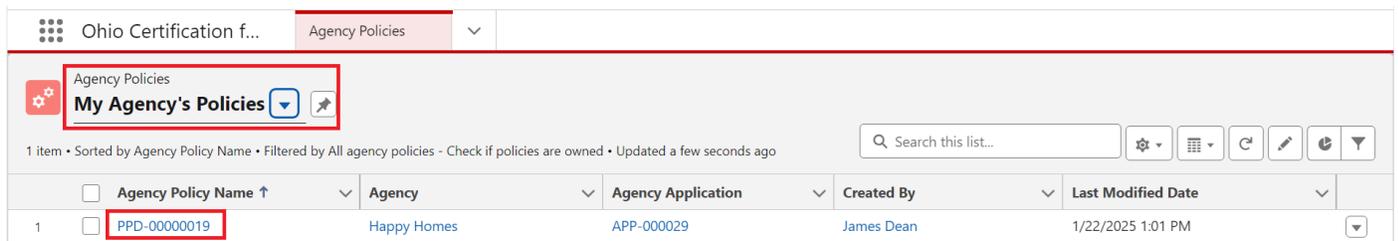
Upon logging in to the OCAF Home Page:

1. Click on the down arrow in the banner section next to the app launcher, which is the nine-dot square in the upper left-hand corner of the page.
2. Select the **Agency Policies** from the list.



The **Agency Policies** section will appear.

1. The default filter will be **Recently Viewed** Agency Policies records, but you may change this view by adding filter criteria and save it by clicking the **pin icon** to change your settings.
2. Select **My Agencies Policies** from the dropdown list.
3. Select the **Agency Policy Name** hyperlink.



The **Agency Policy** screen displays defaulting to the Policies tab.

# Completing a Policy, Plan and Document Revision - Agency

Ohio Certification f... Agency Policies PPD-00000019 | Age... x

Agency Policy **Happy Homes** Create Policy, Plan, Document Revision

Agency Policy Name: PPD-00000019 Agency Type: LPE Certified Agency: Yes Certification Status: Active Owner: [Lisa Licensing Specialist](#)

**Policies** Plans Documents Policy Revisions Certificates Compliance Reports

**Approved Policies**

Policy Title	Document	Revision Date
>  Access to Administrator Policy 5101:2-5-13(A)(19)	<a href="#">Testing Doc.docx</a>	12/3/2024
>  Assurance of Child's Civil Rights 5101:2-5-13(A)(25)	<a href="#">Testing Doc.docx</a>	12/3/2024

## Making a Policy, Plan and/or Document Revision

- To view policy revisions on any **Policies, Plans and/or Documents**, click the **Arrow** to show additional information.

**Policies** Plans Documents Policy Revisions Certificates Compliance Reports

**Approved Policies**

Policy Title	Document	Revision Date
Access to Administrator Policy 5101:2-5-13(A)(19)	<a href="#">Testing Doc.docx</a>	12/3/2024

**Policy Revision History**

Request Number	Revision Type	Revision Date	Status
REQ-0000026	Initial Certification	12/3/2024	Approved
REQ-0000024	Initial Certification	12/3/2024	Approved

- To make a revision on Policies, Plans and/or Documents, click the **Create Policy, Plan, Document Revision** button.

Agency Policy **Happy Homes** Create Policy, Plan, Document Revision

Agency Policy Name: PPD-00000019 Agency Type: LPE Certified Agency: Yes Certification Status: Active Owner: [Lisa Licensing Specialist](#)

**Policies** Plans Documents Policy Revisions Certificates Compliance Reports

**Approved Policies**

Policy Title	Document	Revision Date
Access to Administrator Policy 5101:2-5-13(A)(19)	<a href="#">Testing Doc.docx</a>	12/3/2024

## Completing a Policy, Plan and Document Revision - Agency

The **Create Policy, Plan, Document Revision** box displays.

3. The **Agency** is prepopulated.
4. Click the **Save** button.

Create Policy, Plan, Document Revision

Agency Policy  
PPD-00000019

\* Agency  
Happy Homes

Cancel Save

The **Policy Revisions** tab displays.

Details **Policy Revisions** Plan Revisions Document Revisions Related

**Policy Revisions**

Listed below are the required policies for your agency's selected functions. Upload your written policy for each requirement below from your device. If there is a policy that you do not want to revise then you should select the N/A (Not Applicable) button.

Policy Title	Document	Revision Date
Access to Administrator Policy 5101:2-5-13(A)(19)		<a href="#">Upload Files</a> Or drop files <a href="#">N/A</a>
Assurance of Child's Civil Rights 5101:2-5-13(A)(25)		<a href="#">Upload Files</a> Or drop files <a href="#">N/A</a>

5. Click the **Upload Files** button for all the appropriate Policies you need to revise.

**Note:** This is the same process for **Policies, Plans and Documents** tab.

Details **Policy Revisions** Plan Revisions Document Revisions Related

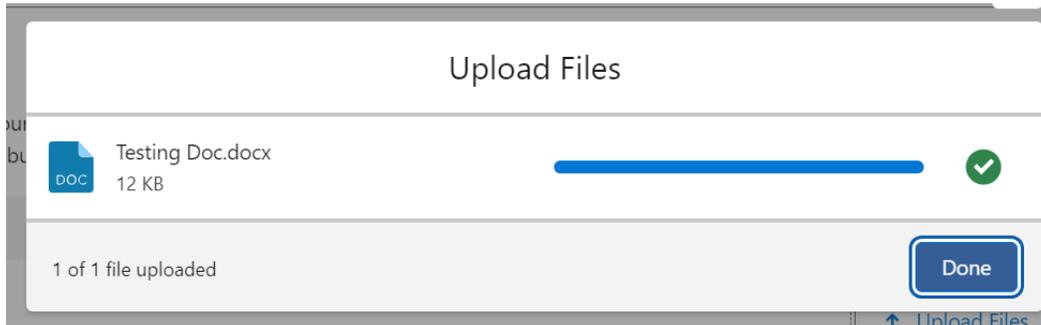
**Policy Revisions**

Listed below are the required policies for your agency's selected functions. Upload your written policy for each requirement below from your device. If there is a policy that you do not want to revise then you should select the N/A (Not Applicable) button.

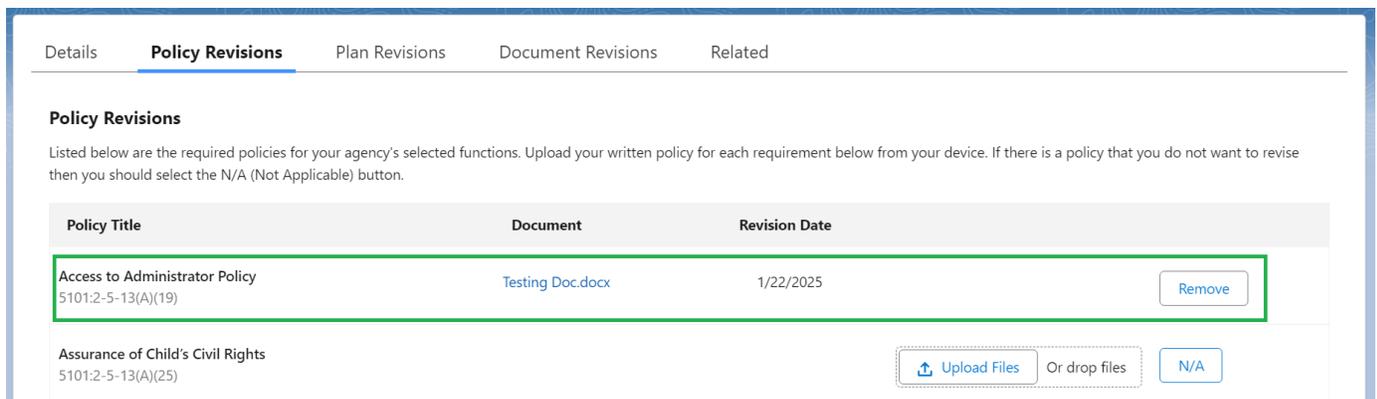
Policy Title	Document	Revision Date
Access to Administrator Policy 5101:2-5-13(A)(19)		<a href="#">Upload Files</a> Or drop files <a href="#">N/A</a>
Assurance of Child's Civil Rights 5101:2-5-13(A)(25)		<a href="#">Upload Files</a> Or drop files <a href="#">N/A</a>

## Completing a Policy, Plan and Document Revision - Agency

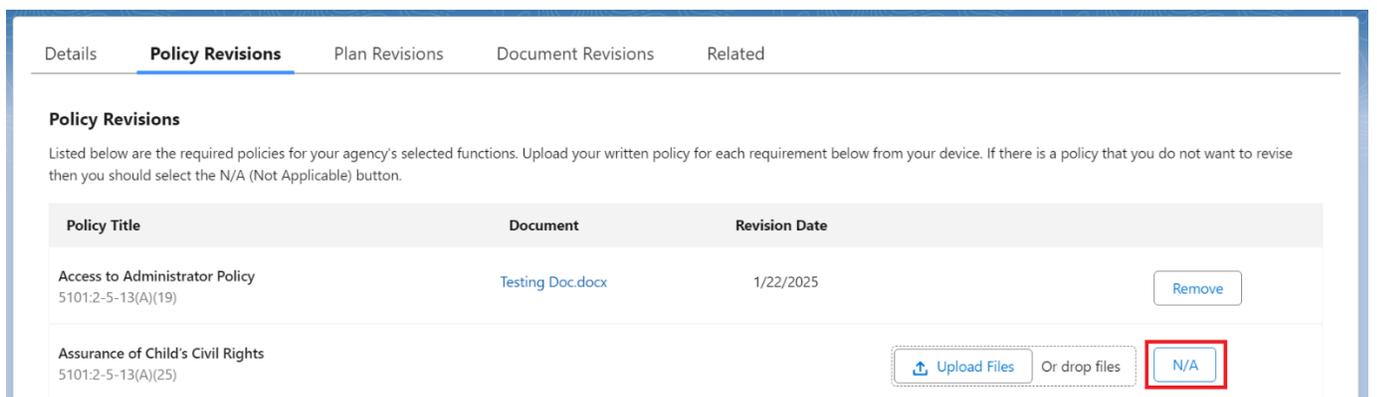
- Once you've selected your document, click the **Done** button. Repeat for each Policy you are revising.



- The uploaded document now displays.



- If there is a Policy that you do not want to Revise, then you should select the **N/A (Not Applicable)** button.



**Note:** N/A will need selected for all Policy, Plan and Documents you are not making a revision on to move forward.

- When completed Uploading Files or selecting N/A for each Policy, click the **Plan Revisions** tab.

# Completing a Policy, Plan and Document Revision - Agency

Ohio Certification f... Agency Policies REQ-0000040 | Policy...

Details Policy Revisions **Plan Revisions** Document Revisions Related

**Policy Revisions**

Listed below are the required policies for your agency's selected functions. Upload your written policy for each requirement below from your device. If there is a policy that you do not want to revise then you should select the N/A (Not Applicable) button.

Policy Title	Document	Revision Date	
Access to Administrator Policy 5101:2-5-13(A)(19)	Testing Doc.docx	1/22/2025	Remove
Assurance of Child's Civil Rights 5101:2-5-13(A)(25)			Upload Files Or drop files N/A

The **Plan Revisions** screen displays.

10. Repeat steps 5-8 for all **Plans** listed.

Details Policy Revisions **Plan Revisions** Document Revisions Related

**Plan Revisions**

Listed below are the required plans for your agency's selected functions. Upload your written plan for each requirement below from your device. If there is a plan that you do not want to revise then you should select the N/A (Not Applicable) button.

Plan Title	Document	Revision Date	
Disaster Preparedness Plan 5101:2-5-13.1(D)			Upload Files Or drop files N/A
Foster Care Pre-Placement and Continuing Training Program Proposal			Upload Files Or drop files N/A

11. When completed Uploading Files or selecting N/A for each Policy, click the **Document Revisions** tab.

Details Policy Revisions **Plan Revisions** **Document Revisions** Related

**Plan Revisions**

Listed below are the required plans for your agency's selected functions. Upload your written plan for each requirement below from your device. If there is a plan that you do not want to revise then you should select the N/A (Not Applicable) button.

Plan Title	Document	Revision Date	
Disaster Preparedness Plan 5101:2-5-13.1(D)			Upload Files Or drop files N/A

The **Document Revisions** screen displays.

12. Repeat steps 5-8 for all **Documents** listed.

# Completing a Policy, Plan and Document Revision - Agency

Details Policy Revisions Plan Revisions **Document Revisions** Related

**Document Revisions**

Listed below are the required documents for your agency's selected functions. Upload your document for each requirement below from your device. If there is a document that you do not want to revise then you should select the N/A (Not Applicable) button.

Document Title	Document	Revision Date
Background checks for college interns, subcontractors, volunteers, employees, board presidents, officers, administrators and foster caregivers 5101:2-5-09.1	 	

13. When completed with uploading Revisions, click the **Submit Request** button at the top of the screen.

**Note:** You can Cancel your Revisions by click the Cancel Request button at any time.

Ohio Certification f... Agency Policies REQ-0000040 | Policy... x

Policy, Plan, Document Revision Request **Happy Homes**  

Agency Policy	Status	Revision Type	Locked?	Revision Request Number	Owner
<a href="#">PPD-00000019</a>	In Progress	Policy Revision	<input type="checkbox"/>	REQ-0000040	Lisa Licensing Specialist

Details Policy Revisions Plan Revisions **Document Revisions** Related

**Document Revisions**

A notification displays verifying the Revisions have been submitted.

The **Policy Revision** screen displays, showing the submitted revisions.

Ohio Certification f... Agency Policies REQ-0000040 | Policy... x

Policy, Plan, Document Revision Request **Happy Homes** 

Agency Policy	Status	Revision Type	Locked?	Revision Request Number	Owner
<a href="#">PPD-00000019</a>	Submitted	Policy Revision	<input type="checkbox"/>	REQ-0000040	Lisa Licensing Specialist

Details **Policy Revisions** Plan Revisions Document Revisions Related

**Policy Revisions** Expand All Collapse All

Listed below are the required policies for your agency's selected functions. Upload your written policy for each requirement below from your device. If there is a policy that you do not want to revise then you should select the N/A (Not Applicable) button.

Policy Title	Document	Revision Date
> Access to Administrator Policy 5101:2-5-13(A)(19)		1/22/2025

14. Click the **Details** tab.

## Completing a Policy, Plan and Document Revision - Agency

The **Status** now displays as **Submitted**.

Department of Job & Family Services

Ohio Certification f... Agency Policies REQ-0000040 | Policy... x

Policy, Plan, Document Revision Request  
**Happy Homes** [Cancel Request](#)

Agency Policy	Status	Revision Type	Locked?	Revision Request Number	Owner
<a href="#">PPD-00000019</a>	Submitted	Policy Revision	<input type="checkbox"/>	REQ-0000040	Lisa Licensing Specialist

**Details** Policy Revisions Plan Revisions Document Revisions Related

Request Details

Revision Request Number REQ-0000040	Status Submitted
Revision Type Policy Revision	

The Revisions have been routed to a Licensing Specialist. You will receive a **Notification** within the OCAF system if the revisions have been Approved or if further information is needed. See below:

1. Click the **Notification** button.
2. Click the **Policy Review Request** notification.

Department of Job & Family Services

Ohio Certification f... Home

Notifications [Mark all as read](#) x

**Policy Revision Request**  
Your Licensing Specialist has reviewed and approved your policy revision request.  
7 minutes ago •

[Children](#)  
[Ohio Administrative Code - 5101:2 Division of Social Services](#)

Welcome to Ohio Certification for Agencies and Families (OCAF)!  
*Manage all of your agency's information and certification in one place*

You will be Navigated to the **Policy, Plan, Document Revision Request** screen.

The Status has been updated to **Approved**.

## Completing a Policy, Plan and Document Revision - Agency

Ohio Certification f... Home REQ-0000040 | Policy...

Policy, Plan, Document Revision Request  
**Happy Homes**

Agency Policy <a href="#">PPD-00000019</a>	Status Approved	Revision Type Policy Revision	Locked? <input checked="" type="checkbox"/>	Revision Request Number REQ-0000040	Owner Lisa Licensing Specialist
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Details **Policy Revisions** Plan Revisions Document Revisions Related

If you have additional questions pertaining to this Deployment Communication, please contact the [Customer Care Center](#).