

Completing a Policy, Plan and Document Revision – Licensing Specialist



**Department of
Children & Youth**

Knowledge Base Article

Completing a Policy, Plan and Document Revision – Licensing Specialist

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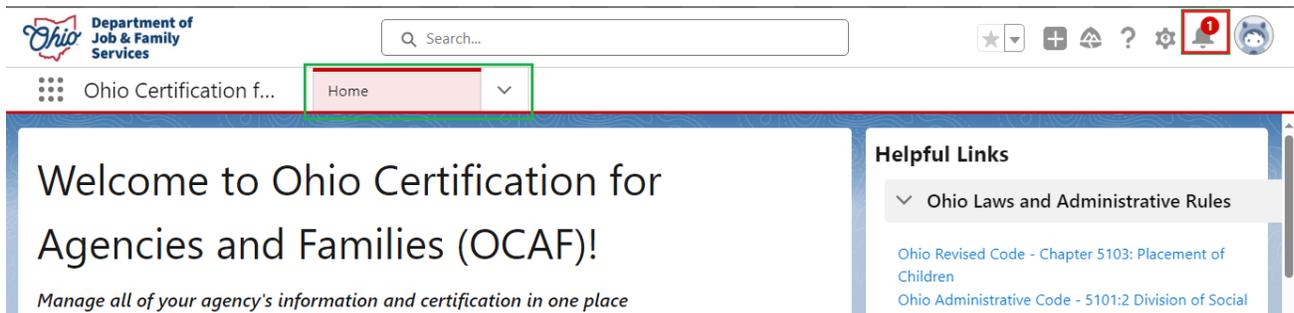
Overview

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

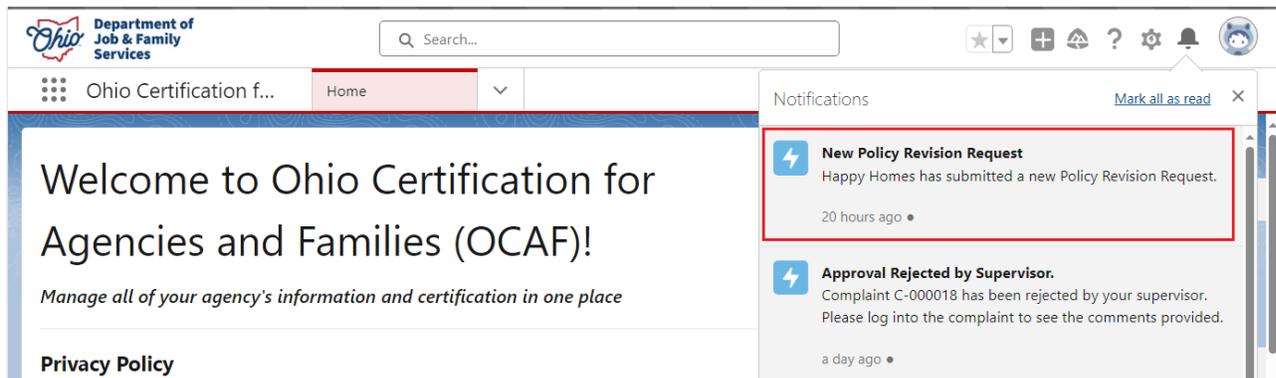
Functionality Location

Upon logging in to the OCAF Home Page:

1. Click the **Notifications Alert** button.



2. Select the **New Policy Revisions Request** notification.



The User will be navigated directly to the **New Policy Revision Request**.

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The screenshot shows a web application interface for managing revision requests. At the top, there is a navigation bar with a nine-dot menu icon, the text "Ohio Certification f...", a dropdown menu showing "Agency Policies", and a search bar containing "REQ-0000040 | Policy...". Below the navigation bar, the main content area is titled "Policy, Plan, Document Revision Request" and "Happy Homes". There are three buttons: "Approve Revision Request", "Return Revision Request", and "Cancel Request". A table below displays the following information:

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

At the bottom, there is a navigation bar with tabs: "Details", "Policy Revisions" (selected), "Plan Revisions", "Document Revisions", and "Related".

Note: This is the most efficient way to access the New Policy Revision Request. The user can navigate to the Policy manually. This will be reviewed below:

OR

Upon logging in to the OCAF Home Page:

3. 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.
4. Select the **Agency Policies** from the list.

The screenshot shows the OCAF Home Page. At the top left, there is a logo for the "Department of Job & Family Services" and a search bar. Below the logo, there is a navigation bar with a nine-dot menu icon, the text "Ohio Certification f...", and a dropdown menu showing "Home". A red box highlights the "Home" dropdown menu, which is open and shows a list of options: "Home", "Accounts", "Contacts", "Individual Applications", "Cases", "Background Checks", "Agency Applications", and "Agency Policies". The "Agency Policies" option is highlighted with a red box. The main content area of the page is partially visible, showing a "Welcome to OCAF Families (OCA)" message and a "Privacy Policy" section. On the right side, there is a "Helpful Links" section with links to "Ohio Laws and Administrative Rules" and "E-Manuals".

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 Polices** from the dropdown list.
3. Select the **Agency Policy Name** hyperlink.

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Ohio Certification f... Agency Policies

Agency Policies
My Agency's Policies

4 items • Sorted by Agency Policy Name • Filtered by All agency policies - Check if policies are owned • Updated a few seconds ago

Search this list...

<input type="checkbox"/>	Agency Policy Name ↑	Agency	Agency Application	Created By	Last Modified Date
<input type="checkbox"/>	PPD-0000017	Testing Agency	APP-000016	James Smith	11/20/2024 11:39 AM
<input type="checkbox"/>	PPD-0000018	Happy Agency	APP-000027	John Smith	11/21/2024 9:07 AM
<input type="checkbox"/>	PPD-0000019	Happy Homes	APP-000029	James Dean	1/22/2025 1:01 PM
<input type="checkbox"/>	PPD-0000024	Happy Hearts	APP-000028	Jane Jones	12/3/2024 11:57 AM

The **Agency Policy** screen displays.

4. Click the **Policy Revisions** tab.

Ohio Certification f... Agency Policies PPD-0000019 | Age...

Agency Policy
Happy Homes

Create Policy, Plan, Document Revision

Agency Policy Name	Agency Type	Certified Agency	Certification Status	Owner
PPD-0000019	LPE	Yes	Active	Lisa Licensing Specialist

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

Approved Policies

Policy Title	Document
✓ Access to Administrator Policy 5101:2-5-13(A)(19)	Testing Doc.docx

5. Select the **Submitted** Policy Revision.

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

Policy Revision Requests (4)

4 items • Sorted by Created Date • Updated a few seconds ago

	Revision Request ...	Revision Type	Status	Approved Date	Created Date ↓
1	REQ-0000040	Policy Revision	Submitted		1/22/2025 1:01 PM
2	REQ-0000039	Policy Revision	Canceled		1/22/2025 12:50 PM
3	REQ-0000026	Initial Certification	Approved	12/17/2024	12/17/2024 10:18 AM
4	REQ-0000024	Initial Certification	Approved	12/16/2024	12/16/2024 3:46 PM

[View All](#)

The **Policy Revision** displays.

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Ohio Certification f... Agency Policies PPD-00000019 | Age... PPD-00000019 | ... REQ-000...

Policy, Plan, Document Revision Request **Happy Homes** Approve Revision Request Return Revision Request Cancel Request

Agency Policy	Status	Revision Type	Locked?	Revision Request Number	Owner
PPD-00000019	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

Reviewing the Policy, Plan and/or Document Revisions

From the Policy, Plan, Document Revision Request screen:

1. Select the dropdown **Arrow** on the **Policies, Plans, Documents** that are marked with a new Document and Revision Date to view the revisions.

Note: Only policies, plans and documents with changes will have a new document attached and a Revision Date listed. All other policies, plans and documents will be listed with N/A that have no changes therefore require no review. Shown in green below:

Policy, Plan, Document Revision Request **Happy Homes** Approve Revision Request Return Revision Request Cancel Request

Agency Policy	Status	Revision Type	Locked?	Revision Request Number	Owner
PPD-00000019	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)	Testing Doc.docx	1/22/2025
> Assurance of Child's Civil Rights 5101:2-5-13(A)(25)		N/A

2. Click the **Document Link** to review the new document received.

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3. Select **Yes, No or N/A** for **Does the policy specify the procedures for ensuring the accessibility of the administrator or designee with executive authority to agency staff and ODJFS representatives at all times as required by OAC 5101:2-5- 13(A)(19)?**
4. **Provide a Narrative in the Comments section.**

Note: A Narrative will be required if No is selected for all questions being answered.

5. Click the **Save to Review History** if you want to save to review history.
6. **Repeat Steps 2-5** for each Policy Revision pending review.

Policy Title	Document	Revision Date
✓ Access to Administrator Policy 5101:2-5-13(A)(19)	Testing Doc.docx	1/22/2025

Does the policy specify the procedures for ensuring the accessibility of the administrator or designee with executive authority to agency staff and ODJFS representatives at all times as required by OAC 5101:2-5- 13(A)(19)?

Comments

> Review History

Once completed, a green checkmark will appear next to each policy revision that was reviewed.

Completing a Policy, Plan and Document Revision – Licensing Specialist

Policy Title	Document	Revision Date
<input checked="" type="checkbox"/> Access to Administrator Policy 5101:2-5-13(A)(19)	Testing Doc.docx	1/22/2025

Does the policy specify the procedures for ensuring the accessibility of the administrator or designee with executive authority to agency staff and ODJFS representatives at all times as required by OAC 5101:2-5-13(A)(19)?

Comments

Testing

7. Click the **Plan Revisions** tab.
8. If any Plan Revision were submitted, **Repeat Steps 2-5**.

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

Plan Revisions

[Expand All](#) [Collapse All](#)

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)		N/A

9. When completed with Plan Revisions, click the **Document Revisions** tab.
10. If any Document Revisions were submitted, **Repeat Steps 2-5**.

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

Document Revisions

[Expand All](#) [Collapse All](#)

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		N/A

Completing a Policy, Plan and Document Revision – Licensing Specialist

Approving the Policy, Plan and/or Document Revisions

The Licensing Specialist has the option to Approve the Policy Revision, Return the Revisions back to the Agency Administrator or Cancel the Policy Revisions.

1. If the Policy Revision need to be returned to the Agency Administrator, click the **Return Revision Request** button.

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

Policy, Plan, Document Revision Request
Happy Homes

Approve Revision Request **Return Revision Request** Cancel Request

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

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

Document Revisions [Expand All](#) [Collapse All](#)

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.

The Policy Revisions will be sent back to the Agency Administrator.

2. If the Policy Revisions can be approved, click the **Approve Revision Request** button.

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

Policy, Plan, Document Revision Request
Happy Homes

Approve Revision Request **Return Revision Request** Cancel Request

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

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

Document Revisions [Expand All](#) [Collapse All](#)

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.

The Status now displays as **Approved**, and the Locked box is now checked.

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

Policy, Plan, Document Revision Request
Happy Homes

Agency Policy PPD-00000019	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

The Agency Administrator will be notified that the Policy Revisions have been Approved.

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