

Closing a Provider Without a Complete Home Study



Knowledge Base Article

Closing a Provider Without a Complete Home Study

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Closing a Provider Without a Complete Home Study

Overview

This Knowledge Base Article describes the steps to take if a **Provider** closes before their **Initial Home Study** has been completed. The **Closed** home study must be documented in Ohio SACWIS so that a **“Close” Recommendation** can be added and then approved by the State for foster care or by the Agency for adoption.

If a Closed home study is not final approved, the **Applicant Date Received will NOT populate** on the “Close” recommendation. To Close a Provider without completing the home study, complete the following steps.

Navigating to the Home Study Screen

1. From the Ohio SACWIS **Home** screen, click the **Provider** tab.
2. Click the **Workload** tab.

Home	Intake	Case	Provider	Financial	Administration		
Workload	Provider Search	Provider Match	Recruitment	Inquiry	Training	Contracts	Agency Certifications

KCCP Pre-Screening Tool

Workload

Provider Worker: Sort By:

Test, Worker

Provider ID	Provider Name	Provider Status	Provider Type	Type Status	Approval/Certification Period	Primary Address
select 123456	Test, Provider	Active	Foster Care	Certified	11/22/2022 - 11/21/2024	

3. Under your name link, click the appropriate **Select** link.

The **Provider Overview** screen for the selected provider appears.

Provider Overview

- Activity Log
- Inquiries
- KPIP History
- KCCP Pre-Screening Tool
- Forms/Notices
- Skills
- Training
- Acceptance Criteria
- Description of Home
- Description of Family
- Foster to Adopt (1692) Home Study
- Home Study**

PROVIDER NAME / ID: **Test, Provider / 123456** CATEGORY / STATUS: **Home / Active**

PRIMARY ADDRESS: **123 Test Rd** PRIMARY CONTACT: **Home:**

Test, Oh 12345

Provider Actions

[Provider Information](#) | [Linked 1692 Providers](#) | [Associated Providers](#)

Approval/Certification Spans

Provider Type	Level of Care	Approval/Certification Period	Agency	Certifying Entity
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4. Click the **Home Study** link in the **Navigation** menu.

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The **Maintain Home Study History** screen appears.

The screenshot shows the 'Home Study Filter Criteria' section with fields for 'From Home Study Start Date' and 'To Home Study Start Date', and radio buttons for 'Exclude' and 'Include'. Below is the 'Maintain Home Study History' table with columns: Provider Type, Home Study Type, Start Date, Status, Recommendation, Recommendation Date, and Agency. A row is shown for Foster Care, Initial, 07/27/2023, In progress, Pending, 09/08/2023, and Test County Children Services Board. Action links (view, edit, copy, report) are present for each row. An 'Add Initial Home Study' button is at the bottom.

	Provider Type	Home Study Type	Start Date	Status	Recommendation	Recommendation Date	Agency
view	Foster Care	Initial	07/27/2023	In progress	Pending	09/08/2023	Test County Children Services Board
edit							
copy							
report							

[Add Initial Home Study](#)

5. If the home study has been started, click the **Edit** link in the appropriate row.
- OR
6. For a new home study, click the **Add Initial Home Study** button.

The **Home Study Details** screen appears.

7. Enter the required fields marked with a red asterisk.

Note: The **Home Study Type**, **Assessor**, **Provider Type**, and **Start Date** are required.

The screenshot shows the 'Home Study Details' form with the following fields: Agency (Test County Children Services Board), Home Study Type (*), Provider Type (*), Start Date (*), Assessor (*), Level of Care, and Priority. The Home Study Type, Assessor, and Start Date fields are highlighted with red boxes. The Save and Cancel buttons are at the bottom.

Agency: Test County Children Services Board

Home Study Type: * Initial

Provider Type: * Foster Care

Start Date: * 07/27/2023

Assessor: * Test, Assessor

Level of Care: Family Foster Home

Priority:

[Save](#) [Cancel](#)

8. Click the **Save** button.

The **Maintain Home Study Information** screen appears displaying a grid of **Home Study Topics** links.

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Maintain Home Study Information

Agency: Test County Children Services Board

Home Study Type: Initial Assessor:

Provider Type: Foster Care Level of Care: Family Foster Home

Start Date: 07/27/2023 Priority:

Home Study Topics

Topic	Status
Basic Provider Information (Name, Household Members, Address and Contact, Caregiver)	
Verifications	Not Completed
Safety Audit	Disposition Status Has Not Been Entered
References	No References Provided
Adult Children References	No / Not Applicable
Description of Home	Record Exists
Description of Family	Record Exists
Assessment Visits	No Visits Linked
Training Completed	Training Requirements Not Completed
Acceptance Criteria Information	Characteristics Information - Not Available / Usage Placement Criteria - Not Available
Recommendation	Pending

[Validate for Approval](#)

Verifying the Verification Information

Important: Other than the **Verification** and **Recommendation**, no other information is required for the **Closed** recommendation to be processed for approval.

1. On the **Maintain Home Study Information** screen, click the **Verifications** link.

Maintain Home Study Information

Agency: Test County Children Services Board

Home Study Type: Initial Assessor:

Provider Type: Foster Care Level of Care: Family Foster Home

Start Date: 07/27/2023 Priority:

Home Study Topics

Topic	Status
Basic Provider Information (Name, Household Members, Address and Contact, Caregiver)	
Verifications	Not Completed
Safety Audit	Disposition Status Has Not Been Entered

The **Maintain Verification Tasks** screen appears.

Closing a Provider Without a Complete Home Study

Maintain Verification Tasks				
	Verification Task	Status	Date	Narrative
view edit	Applicant Attended Information/Orientation Meeting	Verified	03/01/2023	attended the informational meeting on 3/1/2023.
view edit	Initial Assessor Contact	Verified	07/27/2023	Assessor reached out to to initiate home study process on 7/27/2023.
view edit	Application Received by Agency	Verified	07/27/2023	

2. Verify that a **Status** and **Date** are displayed for the **Application Received by Agency** task.
3. If the **Status** and **Date** are not displayed, click the **Edit** link next to the **Date Application Received by Agency** task.

The **Verification Details** screen appears.

4. In the **Status** drop-down list, select **Verified**.

Verification Details	
Task:	Application Received by Agency
Status: *	Verified
Date:	07/27/2023
Narrative:	<input type="text"/>
	Spell Check Clear 2000
Apply Save Cancel Previous Next	

5. Click the **Save** button.

The **Maintain Verification Tasks Information** screen appears displaying the information.

Maintain Verification Tasks				
	Verification Task	Status	Date	Narrative
view edit	Applicant Attended Information/Orientation Meeting	Verified	03/01/2023	attended the informational meeting on 3/1/2023.
view edit	Initial Assessor Contact	Verified	07/27/2023	Assessor reached out to to initiate home study process on 7/27/2023.
view edit	Application Received by Agency	Verified	07/27/2023	

6. Click the **Close** button at the bottom of the screen.

The **Maintain Home Study Information** screen appears.

Closing a Provider Without a Complete Home Study

Entering Recommendation Information

1. On the **Maintain Home Study Information** screen, click the **Recommendation** link.

Maintain Home Study Information

Agency: Test County Children Services Board

Home Study Type: Initial Assessor:

Provider Type: Foster Care Level of Care: Family Foster Home

Start Date: 07/27/2023 Priority:

Home Study Topics

Topic	Status
Basic Provider Information (Name, Household Members, Address and Contact, Caregiver)	
Verifications	Not Completed
Safety Audit	Disposition Status Has Not Been Entered
References	No References Provided
Adult Children References	No / Not Applicable
Description of Home	Record Exists
Description of Family	Record Exists
Assessment Visits	No Visits Linked
Training Completed	Training Requirements Not Completed
Acceptance Criteria Information	Characteristics Information - Not Available / Usage Placement Criteria - Not Available
Recommendation	Pending

[Validate for Approval](#)

The **Recommendation Details** screen appears.

Recommendation Information

Recommendation: * Recommendation Date: 09/08/2023 Service Limits:

Certifying Entity: [\[Link Rule Violations \]](#)

Reason(s) Recommendation Closed or Denied

Primary Reason:

Select All Secondary Reasons that Apply:

<input type="checkbox"/> Age	<input type="checkbox"/> Criminal History	<input type="checkbox"/> Falsification of Application Information
<input type="checkbox"/> Financial Management	<input type="checkbox"/> Living Conditions	<input type="checkbox"/> Marital Status Change
<input type="checkbox"/> Medical Condition	<input type="checkbox"/> Rehab Standards Not Met	<input type="checkbox"/> Required Documentation Not Completed
<input type="checkbox"/> Verification Disqualification	<input type="checkbox"/> Voluntary Withdrawal	

If Primary or Secondary Reason is Other, Explain:

[Spell Check](#) [Clear](#)

[Save](#) [Cancel](#)

Closing a Provider Without a Complete Home Study

2. In the **Recommendation** field (near the middle of the screen), select **Close** from the drop-down list.
3. In the **Primary Reason** field, select the appropriate reason from the drop-down list.
4. If applicable, click the appropriate checkbox(es) in the **Select All Secondary Reasons that Apply** field.
5. Click the **Save** button.

The **Maintain Home Study Information** screen appears showing the **Recommendation** as **Closed**.

Home Study Topics	
Topic	Status
Basic Provider Information (Name, Household Members, Address and Contact, Caregiver)	
Verifications	Not Completed
Safety Audit	Disposition Status Has Not Been Entered
References	No References Provided
Adult Children References	No / Not Applicable
Description of Home	Record Exists
Description of Family	Record Exists
Assessment Visits	No Visits Linked
Training Completed	Training Requirements Not Completed
Acceptance Criteria Information	Characteristics Information - Not Available / Usage Placement Criteria - Not Available
Recommendation	Close

Routing the Home Study for Approval

1. Route the home study for approval according to your agency's processes.
2. Request that your supervisor **Final Approve** the Closed home study.
3. When complete, navigate to the **Provider Overview** screen for the appropriate provider using the steps previously discussed.

Closing a Provider Without a Complete Home Study

- Click the **Approval/Certification** link in the **Navigation** menu.

The screenshot shows a navigation menu on the left with the following items: KPIP History, KCCP Pre-Screening Tool, Forms/Notices, Skills, Training, Acceptance Criteria, Description of Home, Description of Family, Foster to Adopt (1692) Home Study, Home Study, and Approval/Certification. The 'Approval/Certification' item is highlighted with a red box. To the right, the 'Maintain Approval/Certification Recommendations' screen is displayed, featuring a table with columns: Provider Type, Transaction Type, Status, Recommending Agency, Effective Date, and Expiration Date. Below the table is an 'Add Recommendation' button, which is also highlighted with a red box.

The **Maintain Approval/Certification Recommendations** screen appears.

This screenshot is identical to the previous one, showing the 'Maintain Approval/Certification Recommendations' screen. The 'Add Recommendation' button is highlighted with a red box, indicating the next step in the process.

- Click the **Add Recommendation** button.

The **Maintain Transactions** screen appears.

- To create a request for closure, complete the required fields.

Important: Required fields display a red asterisk (*) next to them.

The screenshot shows the 'Maintain Transactions' screen with the following fields: Agency (Test County Children Services Board), Application Date, Agency Contact Person (*), Recommendation Date (*), Provider Type (*), Transaction (*), Level of Care, and Certifying Entity. The 'Provider Type' and 'Transaction' dropdown menus are highlighted with red boxes. Below these fields is a 'Change Transaction Information' section with checkboxes for Name Change, Level of Care Change, Marital Status Change, and Relocation.

Closing a Provider Without a Complete Home Study

7. In the **Closed Reason** field, select the appropriate choice from the drop-down list.

Note: If you select **Other** as the **Closed Reason**, enter comments in the **If Other, Explain** field.

The screenshot shows a form titled "Close Transaction Information". At the top, there are four checkboxes: "Name Change", "Level of Care Change", "Marital Status Change", and "Relocation". Below this is a section for "Close Transaction Information" with a "Closed Reason:" dropdown menu. The dropdown menu is highlighted with a green box. Below the dropdown is a text area labeled "If Other, Explain:" which is highlighted with a red box.

8. Click the **Process Approval** button.

The screenshot shows a form titled "Transfer Transaction Information". It contains several fields: "Receiving Agency:" (dropdown), "Receiving Agency Contact Person:" (text input), "Agency Worker Assignment:" (dropdown), "Level of Care:" (dropdown), and "Certifying Entity:" (dropdown). Below these fields is a "Comments:" text area. At the bottom left, there are buttons for "Spell Check", "Clear", and a character count "2000". The "Process Approval" button is highlighted with a red box.

9. If the closure request is for **Foster Care**, route it to Rita Jackson.

Deactivating a Service and/or an Other Service

When the closure request is **Final Approved**, complete the following steps.

1. Navigate to the **Provider Overview** screen for the appropriate provider using the steps previously discussed.

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Provider Overview

- Activity Log
- Inquiries
- KPIP History
- KCCP Pre-Screening Tool
- Forms/Notices
- Skills
- Training
- Acceptance Criteria
- Description of Home
- Description of Family
- Foster to Adopt (1692) Home Study
- Home Study
- Approval/Certification
- Kinship Assessment
- Large Family Assessment
- Contracts
- Service Credentials**

PROVIDER NAME / ID: Test, Provider / 123456 CATEGORY / STATUS: Home / Active

PRIMARY ADDRESS: 123 Test Rd, Test, Oh 12345 PRIMARY CONTACT: Cell: [redacted]

Provider Actions

[Provider Information](#) | [Linked 1692 Providers](#) | [Associated Providers](#)

Approval/Certification Spans

No Current Provider Certification Available

2. Click the **Service Credentials** link in the **Navigation** menu.

The **ODJFS Approved Services Filter Criteria** screen (**ODJFS Approved Services** tab) appears.

ODJFS Approved Services Filter Criteria

Agency Type: [dropdown] Agency: [dropdown]

Service Category: [dropdown] Service Type: [dropdown]

Service Description: [dropdown] Service Status: Active [dropdown]

Sort By: Service Category (Ascending) [dropdown]

Filter

ODJFS Approved Services

Result(s) 1 to 5 of 9 / Page 1 of 2

	Service Category	Service Type	Service Description	Service Status	Effective Date	Agency
view history	Placement	Emergency Foster Care	Emergency Foster Care	ACTIVE	11/22/2006	Test County Children Services Board

3. In the **ODJFS Approved Services** section, if any **Active** services appear, click the **Deactivate** link next to the appropriate service.

The **ODJFS Approved Services Activation/Deactivation Details** screen appears.

4. The **Effective Date** field automatically populates the current date as the deactivation date. If needed, enter the appropriate deactivation date.

Closing a Provider Without a Complete Home Study

ODJFS Approved Services Activation/Deactivation Details

Agency:	Test County Children Services Board	Service Category :	Placement
Service Type:	Emergency Foster Care	Service Status:	active
Service Description:	Emergency Foster Care		
Effective Date: *	10/17/2023		

Comments:

[Spell Check](#) [Clear](#) 256

[Save](#) [Cancel](#)

5. Click the **Save** button.

The **ODJFS Approved Services Filter Criteria** screen appears. The deactivated row no longer appears in the grid.

6. Repeat **Steps 3-5** as needed to **Deactivate** each **Active** service.

7. When all Active services have been deactivated, click the **Other Services** tab.

The **Other Services Filter Criteria** screen (**Other Services** tab) appears.

ODJFS Approved Services | **Other Services** | Shared Home Agreements

Other Services Filter Criteria

Agency Type:	<input type="text"/>	Agency:	<input type="text"/>
Service Category:	<input type="text"/>	Service Type:	<input type="text"/>
Service Description:	<input type="text"/>	Service Status:	<input type="text"/>
Sort By:	<input type="text" value="Service Category (Ascending)"/>		

[Filter](#)

Other Services

		Service Category	Service Type	Service Description	Service Capacity	Service Status	Effective Date	Agency
view history	deactivate	Case Management	Arranging for Services	Arranging for Services		ACTIVE	10/17/2023	Test County Children Services Board

[Add Other Service](#) [Delete All](#) [Change Status - All](#)

8. If any **Active** services appear, click the **Deactivate** link next to the appropriate service.

The **Other Services Activation/Deactivation Details** screen appears.

Closing a Provider Without a Complete Home Study

- The **Effective Date** field automatically populates the current date as the deactivation date. If needed, enter the appropriate deactivation date.

Other Services Activation/Deactivation Details

Agency:	Test County Children Services Board	Service Category:	Case Management
Service Type:	Arranging for Services	Service Status:	inactive
Service Description:	Arranging for Services	Service Capacity:	
Effective Date: *	10/17/2023		

Comments:

Spell Check Clear 256

Save Cancel

- Click the **Save** button.

The **Other Services Filter Criteria** screen appears. The deactivated row no longer appears in the grid.

- Repeat **Steps 8-10** to **Deactivate** each **Active** Other Service.

Adding Status Information

- Navigate to the appropriate **Provider Overview** screen using the steps previously discussed.
- Click the **Provider Information** link.

Provider Overview

- Activity Log
- Inquiries
- KPIP History
- KCCP Pre-Screening Tool
- Forms/Notices
- Skills
- Training
- Acceptance Criteria
- Description of Home

PROVIDER NAME / ID: Test, Provider / 123456

CATEGORY / STATUS: Home / Active

PRIMARY ADDRESS: 123 Test Rd, Test, Oh 12345

PRIMARY CONTACT: Home:

Provider Actions

Provider Information | Linked 1692 Providers | Associated Providers

The **Provider Name Information** screen (**Basic** tab) appears displaying the **Provider Status Information** section.

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3. In the **Provider Status** field, select **Closed** from the drop-down list.

Provider Status Information

[View Status History](#)

Provider Status	Reason	Status Effective Date
view Active		02/13/1997
edit		

Provider Status:

4. Click the **Add Status** button.

The **Provider Status Information** screen appears.

5. In the **Effective Date** field, enter the appropriate date.

Provider Status Information

Provider Status: *

Effective Date: *

Comments:

6. Click the **OK** button.

The **Provider Name Information** screen (**Basic** tab) appears.

7. Click the **Save** button at the bottom of the screen.

The **Provider Overview** screen appears.

8. Have your supervisor end-date all assignments to this Provider record according to your agency's processes.

If you need additional information or assistance, please contact the OFC Automated Systems Help Desk at sacwis_help_desk@childrenandyouth.ohio.gov.