

# Creating a Non-ODJFS Provider



## Knowledge Base Article

# Creating a Non-ODJFS Provider

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# Creating a Non-ODJFS Provider

## Overview

The Knowledge Base Article discusses how to create a non-ODJFS provider in Ohio SACWIS and how to add provider services.

## Security Profile

To create a non-ODJFS provider, you will need to be assigned to the **Non-ODJFS Provider Creator** security user group.

## Adding a New Non-ODJFS Provider

### Conducting a Provider Search

Adding a new provider begins with a search to determine whether or not the non-ODJFS provider already exists within the system. If the provider does not exist, you will need to create a new provider record in SACWIS.

From the SACWIS home screen:

1. Click the **Provider** tab.
2. Click, **Provider Search**.

The **Search For Provider Profile** grid appears.

3. Type the provider name in the **Provider Name** field.

#### Important:

- For household members, use the naming convention of **Last Name, First Name**.
  - Non-ODJFS providers can be called different names or their name might be abbreviated. You may need to **search by several different names** to locate an existing provider in SACWIS.
4. In the **Provider Category** field, select **Non-ODJFS** from the drop-down box.
  5. Click, **Search**.

The screenshot shows the SACWIS interface. At the top, there is a navigation bar with tabs: Home, Intake, Case, Provider (highlighted), Financial, and Administration. Below this is a sub-navigation bar with links: Workload, Provider Search (highlighted), Provider Match, Recruitment, Inquiry, Training, Contracts, Agency Certifications, and KCCP Pre-Screening Tool. Below the navigation is a blue header for the 'Search For Provider Profile' form. The form contains the following fields:

- Provider ID:
- OR
- Provider Name:
- Member Last Name:
- Member First Name:
- Member Middle Name:

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Provider Category:

Agency Type:

Agency:

Provider Type:   Include "Closed" Provider Type Status

Provider Status:

[Address, Contact and Provider Reference Criteria](#) ▾

Name Match Precision  
Returns results matching entered names including AKA names/nicknames

+ AKA/Nicknames

Fewer Results More Results

If there are search results, the **Provider** screen will expand to display the **Search Results** grid.

6. Select an option(s) from the list below:

- Click the **view** link to verify the information
- OR
- Click the **edit** link to edit the information
- Skip to the **Adding Provider Services** section below to add Provider Services.

If the provider you were looking for does not display:

7. Click, **Add Non-ODJFS Provider**.

**Search Results**

Result(s) 1 to 15 of 500 / Page 1 of 34

	Provider Name / ID	Provider Status	Provider Category	Address
<input type="button" value="view"/> <input type="button" value="edit"/>		ACTIVE	NONODJFS	
<a href="#">View Provider Type Information</a> ▾				
<input type="button" value="view"/> <input type="button" value="edit"/>		ACTIVE	NONODJFS	
<a href="#">View Provider Type Information</a> ▾				

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 ▾

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The **Provider** screen appears, displaying the **Basic** tab page.

## Adding the Provider Type

**Important Provider Type Guidelines:** You must select the Provider **Type** before you can enter a new provider's name. If you select any one of the following values (shown in the green box below), there must be a:

- Primary care member specified in the **Members** tab (See **Adding Members** sub-section)
- Provider status (See **Adding the Provider Status** sub-section)
- Primary address (See **Adding the Provider Address** sub-section)
- Primary contact (See **Adding Provider Contact Information** sub-section)

Adoptive Care – International	Emergency Caregiver
Adoptive Home Provider – Out of State	Host Home Independent Living Provider
Adoption Home Provider – In State	Out of State Foster Home
Alternative Caregiver	Out of State Kinship Care Provider – Non-Relative
Babysitter / Child Care Provider	Out of State Kinship Care Provider – Parent
Child Care Provider – Type A	Out of State Kinship Care Provider – Relative
Child Care Provider – Type B	

### 1. Click, **Add Type**.

The screenshot shows the 'Provider' screen with the 'Provider' tab selected. The 'Basic' sub-tab is active. The 'Provider Type Information' section is visible, showing a grid with columns for 'Provider Type/Child Name', 'Agency', 'Type Effective Date', 'Type End Date', and 'Type Status'. A red asterisk (\*) is next to the 'Type Effective Date' field. The 'Add Type' button is highlighted in a red box.

The **Provider Type Information** grid appears, displaying a red asterisk (\*) next to required fields.

2. In the **Provider Type** select from the **Provider Type** drop-down menu.
3. In the **Type Effective Date** field, select the appropriate date.

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**Note:** Be sure to back-date all effective dates to the date you want to use the provider, or prior to that date.

4. Select, **Active**, from the **Type Status** drop-down menu.
5. In the **Effective Date** field, select the appropriate date for the Type status.
6. Click, **OK**.

The screenshot shows the 'Provider Type Information' form. The 'Provider Type' dropdown is highlighted with a red box, and the 'Type Status' dropdown is also highlighted with a red box. Below the form, the 'OK' button is highlighted with a red box.

The **Provider** screen appears, displaying the newly selected information in the **Provider Type Information** grid.

The screenshot shows the 'Provider' screen with the 'Provider Type Information' grid. The grid contains one row of data:

	Provider Type/Child Name	Agency	Type Effective Date	Type End Date	Type Status	
<a href="#">edit</a> <a href="#">view</a>	Child Care Provider - Private	Department of Job and Family Services	06/01/2020		Active	<a href="#">delete</a>

## Adding the Provider Status

**Important:** The steps in this sub-section **may be required** depending on the previously selected **Provider Type**.

1. In the **Provider Status Information** grid, select from the **Provider Status** drop-down menu.
2. Click, **Add Status**.

The screenshot shows the 'Provider Status Information' form. The 'Provider Status' dropdown is highlighted with a red box, and the 'Add Status' button is also highlighted with a red box.

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The **Provider Status Information** grid appears.

3. Select, **Active**, from the **Provider Status** drop-down menu.
4. In the **Effective Date** field, choose the provider status effective date.
5. Click, **OK**.



The **Provider Status Information** grid appears, displaying the newly selected information.



Provider Status	Reason	Status Effective Date
Active		06/01/2020

## Adding the New Provider Name

1. On the **Basic** tab, in the **Provider Name Information** grid, click, **Add Name**.

**Important:** If you selected one of the provider types listed in the **Adding the Provider Type** section (**Provider Type Guidelines**), you cannot create a new provider name. For those types, the provider name will automatically be created from the primary member's name.



The **Provider Name Information** grid appears.

2. In the **Provider Name** field, enter the provider name.
3. In the **Effective Date** field, enter the provider effective date.
4. Click, **OK**.



# Creating a Non-ODJFS Provider

The **Provider Name Information** grid appears, displaying the newly added **Provider Name** and **Effective Date**.

5. Click the **Address** tab.

The screenshot shows the 'Manage Provider Details' screen with the 'Address' tab selected. The 'Provider Name Information' grid is visible, containing one row with the following data:

Provider Name	Effective Date	End Date
edit Doe, Dr. John	06/01/2020	

Below the grid is an 'Add Name' button.

## Adding the Provider Address

The **Manage Provider Details** screen appears, displaying the **Address** tab page.

1. Click, **Add Address**.

The screenshot shows the 'Manage Provider Details' screen with the 'Address' tab selected. The 'Provider Address' section is visible, containing a table with the following columns: Type, Address, Effective Date, Primary, and Hazard. Below the table is an 'Add Address' button. The 'Provider Contact' section is also visible, containing a table with the following columns: Type, Details, and Primary. Below the table is an 'Add Contact' button.

The **Domestic Address Search Criteria** screen appears.

To determine if the provider's address already exists in the system:

2. Enter an address in the **Address Lookup** field.
3. Click, **Search**.

The screenshot shows the 'Domestic Address Search Criteria' screen. The 'Address Lookup' field is highlighted with a red box and contains the text 'Enter at least 8 characters to get address suggestions'. Below the field is a 'PO Box or Manual Search Criteria' field. At the bottom of the screen, there are three buttons: 'Search', 'Clear Form', and 'Cancel'. The 'Search' button is highlighted with a red box.

The **Domestic Address Search Results** grid appears.

If the address you were searching for displays in the **Domestic Address Search Results** grid:

4. Click **select** beside the address.
  - Skip to the **Adding the Address Type** sub-section below.

# Creating a Non-ODJFS Provider

Domestic Address Search Results					
Address	Valid	County	Geo Code	Hazard	
<input type="text" value="persons.associated"/>	Yes		None	No	
<input type="text" value="persons.associated"/>	Yes		None	No	

If the address you are looking for **does not display**:

5. Click, **Add New Address**.

**Note:** This action creates the new address and adds it to the system. You can then select it and add it to the provider's record.

<input type="text" value="persons.associated"/>	Yes	Hamilton	None	No	
<input type="text" value="persons.associated"/>	Yes	Hamilton	None	No	

The **Domestic Address Details** grid appears.

6. Fill in the address fields with the new information or enter the missing information. Some fields will auto-populate from the previous screen. Required information is designated with a red asterisk (\*).
7. When complete, click, **Save**.

**Domestic Address Details**

Type:  Regular  PO Box

Street Number:  Street Name:

Unit:

City: \*  State: \*  Zip Code: \*

County:  Other County:

School District:  Other District:

Census Tract:  Geographical Designation:

Neighborhood Name:

Law Enforcement Jurisdiction:

Environmental Hazard Details:  No Known Environmental Hazards

Directions:

Created Date:  Created By:

Modified Date:  Modified By:

The **Provider Address Details** grid appears, displaying a message that your data has been saved.

**Important:** You will now have to do another search for this provider's address to add it to the provider's record. To locate the provider's new address (that was just added) enter the address criteria in the fields on the **Domestic Address Search Criteria** screen. Some fields may already be auto populated from information that was just entered.

## Creating a Non-ODJFS Provider

1. Select from the **Address Type** drop-down menu.
2. Enter the **Effective Date**.
3. Click, **OK**.

Your data has been saved

PROVIDER NAME / ID / New CATEGORY: Non-ODJFS

Provider Address Details

Address:

Address Type: \* Residence

Effective Date: \* 06/01/2020

CIO:

Location Details:

Primary Address

End Date:

Spell Check Clear 4000

OK Cancel

The **Manage Provider Details** screen appears, displaying the new address in the **Provider Address** grid.

4. Click, **edit**.

Manage Provider Details

PROVIDER NAME / ID / New CATEGORY: Non-ODJFS

Basic Address Members Relationships Capacity

Provider Address

View Address History

	Type	Address	Effective Date	Primary	Hazard	
edit View	Residence		06/01/2020	No	No	delete

Add Address

The **Provider Address Details** screen appears with the new address displaying at the top.

### Adding the Address Type

1. Make a selection from the **Address Type** drop-down menu.
2. Place a checkmark in the **Primary Address** check box.
3. Enter the **Effective Date**.
4. Click the **OK** button.

Provider Address Details

Address:

Address Type: \* Residence

Effective Date: \* 06/01/2020

CIO:

Location Details:

Primary Address

End Date:

Spell Check Clear 4000

OK Cancel

# Creating a Non-ODJFS Provider

The **Manage Provider Details** screen appears, displaying the new address information.

5. Click, **Add Contact**.

The screenshot shows the 'Manage Provider Details' interface. At the top, there are tabs for 'Basic', 'Address', 'Members', 'Relationships', and 'Capacity'. The 'Address' tab is active, displaying a table with columns: Type, Address, Effective Date, Primary, and Hazard. A row is visible with 'Residence' as the type, an effective date of '06/01/2020', and 'Yes' for Primary and 'No' for Hazard. Below the table is an 'Add Address' button. The 'Provider Contact' section is partially visible, showing a table with columns: Type, Details, and Primary. An 'Add Contact' button is highlighted with a red box.

The **Contact Information** grid appears.

## Adding Provider Contact Information

1. Make a selection from the **Type** drop-down menu.
2. Click the **OK** button.

The screenshot shows the 'Contact Information' form. The 'Type' dropdown menu is highlighted with a red box. Below the form, there are 'OK' and 'Cancel' buttons, with the 'OK' button also highlighted with a red box.

The **Manage Provider Details** screen appears, displaying the new information in the **Provider Contact** section.

3. Click the **Members** tab.

The screenshot shows the 'Manage Provider Details' interface with the 'Members' tab selected. The 'Provider Contact' section now displays a table with columns: Type, Details, and Primary. A row is visible with 'Home' as the type and '(555) 555-5555' as the details, with 'Yes' for Primary. Below the table is an 'Add Contact' button.

# Creating a Non-ODJFS Provider

The **Manage Provider Details** screen appears, displaying the Members tab page.

## Adding Members

1. Click, **Add Member**.

The screenshot shows the 'Manage Provider Details' interface. At the top, there is a header with 'PROVIDER NAME / ID / New' and 'CATEGORY: Non-ODJFS'. Below this are tabs for 'Basic', 'Address', 'Members', 'Relationships', and 'Capacity'. The 'Members' tab is selected. Underneath, there is a section titled 'Current Active Members' with a 'View Member History' link. A table with columns 'Name / ID', 'Gender', 'DOB', 'Age', 'Role', and 'Effective Date' is visible. At the bottom left, an 'Add Member' button is highlighted with a red box.

### Important:

- A **member** can be a provider, a person who works for the provider, or a person who resides in the household other than a provider, such as an uncle or a sister.
- A non-ODJFS provider **does not** have to have members linked to be considered an active non-ODJFS provider.
- Depending on the provider type previously selected, you may be required to add a person as the primary member.
- You will first search to see if the member already exists within Ohio SACWIS. If the member does not exist, you will need to create a new member record.

The **Search For Person** screen appears.

1. Enter the member search criteria in the appropriate fields.
2. Click, **Search**.

The screenshot shows the 'Search For Person' screen. It features several input fields: 'Person ID', 'SSN', 'Last Name', 'First Name', 'Middle Name', 'DOB' (with a calendar icon), 'Gender', and 'Age Range' (with 'From Age' and 'To Age' sub-fields). There are also 'OR' and '~ OR ~' operators between the fields. A note states: 'Note: If Person ID or SSN are entered, all other search criteria will be ignored'. The entire search area is enclosed in a red box.

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Reference, TCN, and Address Criteria ▾

Name Match Precision  
Returns results matching entered names including AKA names/nicknames

Sort by: Relevance (Highest-Lowest) ▾

+ AKA/Nicknames

Fewer Results More Results

Search Clear Form Return

The results appear in the **Person Search Results** grid at the bottom of the screen.

- If the member that you are searching for is already in the system, click the **select** link beside the relevant person's name.

To continue, skip to the sub-head below that says, **Whether a new person was added or an existing person was located, continue as follows:**

- If the member is not in the system, click, **Create New Person**.

Person Search Results

Result(s) 1 to 15 of 81 / Page 1 of 6

Include only active case members

	Person Name / ID	Address	Gender	(Age) DOB	Active Case
select					
	Related Persons ▾				
select					
	Related Persons ▾				

Create New Person

The **Person Information** screen appears.

- Complete the fields, as needed. There are also multiple tabs where information can be added.
- When complete, click, **Save**.

Basic Demographics Address Additional Characteristics Safety Hazard

Person Information

Prefix: ▾

First Name: \*

Middle Name:

Last Name: \*  Clendenin

Suffix:

Populate AKA Name

Gender: Female ▾

SSN:

No SSN Exists  Retain  Add/Edit

DOB:

Age:

Estimated DOB  DOB Unknown

Hair Color:

Eye Color:

Sexual Orientation:

Deceased Deceased Date:

Age At Time Of Death:

Deceased Date Unknown

Driver's License #:

Issue State:

Expiration:

AKA Names

Prefix	First Name	Middle Name	Last Name	Suffix	AKA Type

Add AKA

Apply Save Cancel

# Creating a Non-ODJFS Provider

The **Person Overview** screen appears.

7. Click, **Close**.

Person Overview

Profile  
Education  
Medical  
Employment  
Military  
Background  
Delinquency  
SACVIS History  
Relationships

Your data has been saved.

PERSON NAME / ID: [REDACTED]

RACE:  
HISPANIC / LATINO:  
HAIR COLOR:  
EYE COLOR:

ENVIRONMENTAL HAZARDS:

AKA Names

ICWA

Date Family Was Asked	Possible Tribal Affiliation	Tribe Name	Response/Outcome
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Close

The **Provider Member Detail** screen appears displaying the name and ID number.

8. Make a selection from the **Member Role** drop-down menu.

9. Make a selection from the **Member Type** drop-down menu.

10. Enter the **Effective Date**.

**Note:** If the member type is temporary, enter a date in the **Estimated Leave Date** field.

11. Click, **OK**.

Provider Member Detail

PROVIDER NAME / ID: / New CATEGORY: Non-ODJFS

Member Details

Member Name/ ID: [REDACTED]

Member Role: [REDACTED]

Member Type: [REDACTED]

Estimated Leave Date: [REDACTED]

Effective Date: [REDACTED]

End Date: [REDACTED]

End Reason: [REDACTED]

Member Relationships

No relationship information found

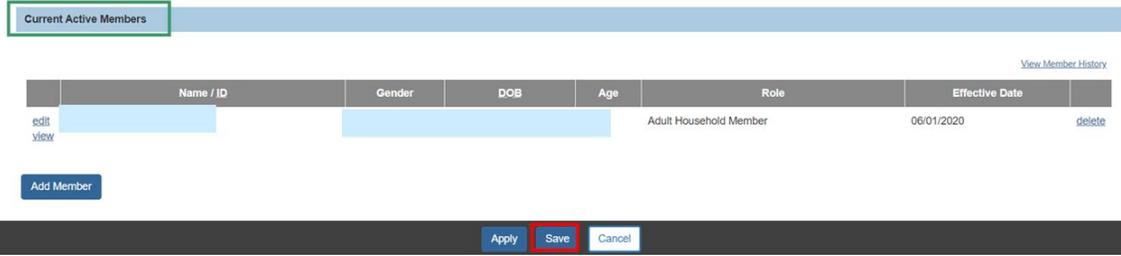
Edit Relationships

Ok Cancel

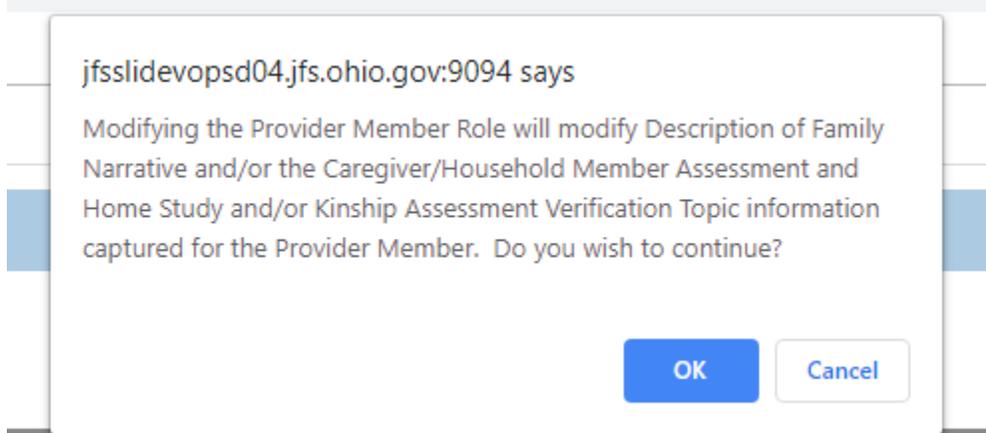
# Creating a Non-ODJFS Provider

The **Current Active Members** grid appears, displaying the newly added member.

12. Click, **Save**.



**Note:** If the following message appears, click, **OK** button. The message is a reminder that information for this provider will be modified.

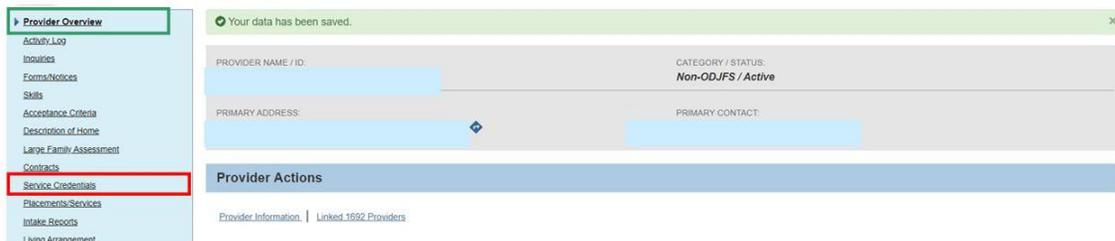


The **Provider Overview** screen appears stating that the data has been saved. The new **Provider Name** and **Provider ID** also appear at the top of the screen (as shown in orange).

**Note:** You might choose to write the **Provider ID** number down for easy reference.

## Adding Provider Services

1. In the **Navigation** menu on the left, click the **Service Credentials** link.



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The **Service Credentials** screen appears, displaying the **Other Services** tab page.

2. Click, **Add Other Services**.

PROVIDER NAME / ID: [Redacted] CATEGORY: Non-ODJFS

**Other Services** | Shared Home Agreements

**Other 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**

Service Category	Service Type	Service Description	Service Capacity	Service Status	Effective Date	Agency
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**Add Other Service**

The **Other Services Details** grid appears.

3. In the **Service Category** field, select the appropriate category.
4. In the **Service Type** field, select the appropriate type.
5. In the **Service Description** field, select the appropriate description.
6. In the **Service Status** field, select the appropriate status.
7. In the **Effective Date** field, enter the effective date that the service status is active.
8. Click, **Save**.

Home | Intake | Case | **Provider** | Financial | Administration

Workload | **Provider Search** | Provider Match | Recruitment | Inquiry | Training | Contracts | Agency Certifications | KCCP Pre-Screening Tool

PROVIDER NAME / ID: [Redacted] CATEGORY: Non-ODJFS

**Other Services Details**

Agency: County Department of Job and Family Services

Service Category: [Dropdown] Service Type: [Dropdown] Service Description: [Dropdown] Service Capacity: [Text]  
Service Status: [Dropdown] Effective Date: 06/16/2020 [Calendar]

**Save** | Cancel

The **Service Credentials** screen appears displaying the newly added provider service.

**Note:** Repeat the steps above in this section to add additional provider services.

# Creating a Non-ODJFS Provider

Your data has been saved.

PROVIDER NAME / ID: [Redacted] CATEGORY: Non-ODJFS

**Other Services** | Shared Home Agreements

**Other 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**

	Service Category	Service Type	Service Description	Service Capacity	Service Status	Effective Date	Agency
<a href="#">view history</a> <a href="#">deactivate</a>	Counseling	Family Counseling	Family Counseling		ACTIVE	06/16/2020	County Department of Job and Family Services

[Add Other Service](#)

If you need additional information or assistance, please contact the OFC Automated Systems Help Desk at [SACWIS\\_HELP\\_DESK@jfs.ohio.gov](mailto:SACWIS_HELP_DESK@jfs.ohio.gov).