

Understanding Provider Home Study Snapshot Data



Knowledge Base Article

Understanding Provider Home Study Snapshot Data

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Understanding Provider Home Study Snapshot Data

Overview

Much of the data contained within a **Provider Home Study** record pulls from other areas of the application (ie. the applicant's Person Record). Prior to **May 30, 2014**, data within a **Provider Home Study** that pulls from other areas of the application was dynamic. This means that a user could approve a **Home Study**, and if the user did not save a copy of the **Home Study Report**, the data, as it existed at the time of the **Home Study Approval**, was 'lost' when the information that pulls from other areas of the system was modified.

This was problematic because, if the report was not saved at the time of approval, users were not able to review **Historical Data** as it existed at the time of the **Home Study Approval**. The **Home Study Snapshot** functionality was developed a means to preserve this historical data.

The **Home Study Snapshot** functionality "**Freezes**" Ohio SACWIS data at the time a home study is **Approved** within the provider record. Therefore, if data that pulls from other areas of the application is modified **After** the approval of a home study, the system will still retain a **Snapshot** of the data as it looked at the time of the **Home Study Approval**.

Important: Home studies that have been approved **PRIOR to May 30, 2014**, will **NOT** be "**Frozen**" and, therefore, will **NOT** display **Historical Data** as it looked at the time of the **Home Study Approval**. Instead, home studies approved **PRIOR to May 30, 2014**, will continue to be dynamic and display **Current Data** for data elements that pull from other areas of the application (ie. Person Record).

In addition, home studies with a **Status** of **In-Progress**, **Pending Approval**, or **Created in Error** will also continue to be dynamic, and display **Current Data** for data elements that pull from other areas of the application.

This article illustrates the difference in viewing home studies that were approved prior to and after the implementation of the **Home Study Snapshot** functionality.

Understanding Provider Home Study Snapshot Data

Navigating to Maintain Home Study History

Follow the steps below to navigate to the **Maintain Home Study History** page.

1. On the Ohio SACWIS **Home** screen, click the **Provider** tab.
2. Click the Provider Search tab.



OR,

3. Click the universal **Search** link at the top of the screen.
4. Select the **Provider Search** button.



The **Provider Profile Search Criteria** screen appears.

5. On the **Provider Search** tab, enter the appropriate search criteria into the fields as needed.

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Search For Provider Profile

Provider ID:

OR

Provider Name:

Member Last Name: Member First Name:

Member Middle Name:

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

6. Click the **Search** button.

The results appear in the **Provider Profile Search Results** grid.

7. Click the **Edit** link in the appropriate row.

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Search Results

Result(s) 1 to 1 of 1 / Page 1 of 1

	Provider Name / ID	Provider Status	Provider Category	Address
view edit	Test, Provide / 123	ACTIVE	HOME	Test Address

[View Provider Type Information](#) ▾

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](#)
- [Approval/Certification](#)
- [Kinship Assessment](#)
- [Large Family Assessment](#)

PROVIDER NAME / ID: Test, Provider / 123 TIER 3

CATEGORY / STATUS: **Home / Active**

PRIMARY ADDRESS: 123 Test Rd, Test Oh, 12345 PRIMARY CONTACT: Cell: (123) 456-7899

Provider Actions

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

Approval/Certification Spans

Provider Type	Level of Care	Approval/Certification Period	Agency	Certifying Entity
Foster Care	Treatment Foster Home	07/01/2023 - 06/30/2025		ODJFS
Adoptive Care		07/01/2023 - 06/30/2025		ODJFS

Note: If you are **Assigned** to the Provider record, you can also access it through your **Workload** or your **Assignments** page.

8. Click the **Home Study** link in the navigation menu.

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

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Reviewing a Home Study Approved Prior to Home Study Snapshot

Reminder: As stated in the overview section of this article, home studies that have been approved **PRIOR to May 30, 2014**, will **NOT** be “Frozen” and, therefore, will **NOT** display **Historical Data** as it looked at the time of the **Home Study Approval**. Instead, home studies approved **PRIOR to May 30, 2014**, will continue to be dynamic and display **Current Data** for data elements that pull from other areas of the application (ie. Person Record).

1. Click the **View** link to select the **Home Study** you wish to review.

Home Study Filter Criteria

From Home Study Start Date:  To Home Study Start Date: 

Created in Error: Exclude Include

[Filter](#)

Maintain Home Study History

	Provider Type	Home Study Type	Start Date	Status	Recommendation	Recommendation Date	Agency
view copy report	Adoptive Care	Initial	07/19/2023	Approved	Approve	08/25/2023	Test County Children Services Board

[Add Initial Home Study](#)

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

2. Select **Basic Provider Information** from the **Home Study Topics** list.

Maintain Home Study Information

Agency: Test County Children Services Board

Home Study Type: Initial Assessor:

Provider Type: Adoptive Care Level of Care:

Start Date: 07/19/2023 Priority:

Home Study Topics

Topic	Status
Basic Provider Information (Name, Household Members, Address and Contact, Caregiver)	
Verifications	Completed
Safety Audit	Disposition Status Has Been Entered
References	3 of References Provided

The **Provider Information** screen appears.

Understanding Provider Home Study Snapshot Data

Note: For all home studies that have been approved **PRIOR to May 30, 2014**, the following **Warning** message will display above the provider category at the top of the screen.

⚠ WARNING: Information displayed on this page is current person and provider data, this home study was approved before addition of snapshot functionality.

Important: The following **Person** or **Provider** data is not editable through the **Basic Provider Information** link on Approved home studies:

- Member List
- Applicant Relationship Information
- Marital Status
- Provider Address
- Provider Contact

Provider Information

Assessor Name: Test, Adult
 Agency: Test County Children Services Board
 Agency Address: 123 Test Rd, Test Oh, 12345
 Phone: (123) 456-7899
 Fax:

Member List

	Name/Person ID	Date of Birth	Role	Effective Date	Type	Estimated Leave Date
Stored Person Details	Test, Provider / 123	09/22/1974	Applicant 1	05/23/2023	Permanent	
Skills:						

[Applicant Relationship Information](#) ▾

Marital Status

Marital Status: Single parent household, mother only
 Effective Date: 05/23/2023

Provider Address

Address:
 Directions to Home from Agency:
 Name of Public School District: TEST CITY

Provider Contact

Type	Detail	Description
Work	Testing	
Email	Testing	
Work	Testing	1/7/16

Expiration date of current foster home certificate or adoptive home study approval:
 [HINT: An expiration date only displays when completing the JFS 01385]

Close

Understanding Provider Home Study Snapshot Data

3. Click the **Close** button to return to the **Maintain Home Study Information** screen.
4. From the **Maintain Home Study Information** screen, click the **Close** button again.



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

Recording a Home Study Amendment or Recert/Update

Note: This article only outlines the changes to **Basic Provider Information** resulting from the **Home Study Snapshot** functionality. Please see the article entitled, [Completing a Foster Care Recertification or Adoption Home Study Update](#), for more detailed instructions on completing home study amendment or recert/update.

1. Select the **Copy** hyperlink next to the home study you wish to **Amend** or **Recertify/Update**.
 - This creates a home study with the status of **'In Progress'** which allows the record to be modified.

A screenshot of the "Maintain Home Study History" screen. It features a table with columns: Provider Type, Home Study Type, Start Date, Status, Recommendation, Recommendation Date, and Agency. The first row shows "Adoptive Care", "Initial", "07/19/2023", "Approved", "Approve", "08/25/2023", and "Test County Children Services Board". Below the table is a button labeled "Add Initial Home Study". The "Copy" link in the first row is highlighted with a red box.

	Provider Type	Home Study Type	Start Date	Status	Recommendation	Recommendation Date	Agency
view	Adoptive Care	Initial	07/19/2023	Approved	Approve	08/25/2023	Test County Children Services Board
COPY							
report							

[Add Initial Home Study](#)

The **Home Study Details** screen appears.

Understanding Provider Home Study Snapshot Data

2. Select the appropriate values for the required fields.
3. Click the **Save** button.

Home Study Details

Agency: Test County Children Services Board

Home Study Type: * [dropdown]
Provider Type: * [Adoptive Care]
Start Date: * [calendar icon]

Assessor: * [dropdown]
Level of Care: [dropdown]
Priority: [dropdown]

Save Cancel

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

4. Select **Basic Provider Information** from the **Home Study Topics** list.

Maintain Home Study Information

Agency: Test County Children Services Board

Home Study Type: Recertify/Update
Provider Type: Adoptive Care
Start Date: 09/18/2023

Assessor:
Level of Care:
Priority:

Topic	Status
Basic Provider Information (Name, Household Members, Address and Contact, Caregiver)	Not Provided
Amend/Update	Not Provided
Verifications	Not Completed

The **Provider Information** screen appears.

5. Click **Update Provider Information** to access the **Basic Provider Information** screen in **Edit** mode.

Understanding Provider Home Study Snapshot Data

Provider Information

Assessor Name: Test, Adult
 Agency: Test County Children Services Board
 Agency Address: 123 Test Rd, Test Oh, 12345
 Phone: (123) 456-7899
 Fax:

Member List

Name/Person ID	Date of Birth	Role	Effective Date	Type	Estimated Leave Date
Test, Provider	09/22/1974	Applicant 1	05/23/2023	Permanent	

Skills:

Applicant Relationship Information

Marital Status
 Marital Status: Single parent household, mother only
 Effective Date: 05/23/2023

Provider Address
 Address: Test Address
 Directions to Home from Agency:
 Name of Public School District: TEST CITY

Provider Contact

Type	Detail	Description
Work	(123) 456-7898	
Email	raffycat22@gmail.com	
Work		1/7/16

Expiration date of current foster home certificate or adoptive home study approval: 08/24/2025
[HINT: An expiration date only displays when completing the JFS 01385]

The **Basic Provider Information** screen appears.

6. Edit the **Provider Information** as needed.
7. Click the **Save** button.

Understanding Provider Home Study Snapshot Data

Basic Address Members Relationships Caregivers Capacity

Provider Name Information

Provider Name	Effective Date	End Date
Test, Provider	05/23/2023	

Provider Type Information

Closed Type Status: Exclude Include Foster to Adopt (1692): Exclude Include

Provider Type/Child Name	Agency	Type Effective Date	Type End Date	Type Status
view Adoptive Care	Test County Children Services Board	07/19/2023		Approved
edit view Kinship Care - NonRelative/Bennett, Olivia Kay	Test County Children Services Board	05/23/2023		Approved Kinship Assessment

Provider Status Information

[View Status History](#)

Provider Status	Reason	Status Effective Date
view Active		05/23/2023
edit		

Provider Status:

Provider Reference Information

The **Provider Information** page appears displaying any changes that were made.

- From the **Provider Information** page, click **Close** to return to the **Home Study Topics** screen.



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

- Click the **Validate for Approval** button.

Understanding Provider Home Study Snapshot Data

Maintain Home Study Information		
Agency:	Test County Children Services Board	
Home Study Type:	Recertify/Update	Assessor:
Provider Type:	Adoptive Care	Level of Care:
Start Date:	09/18/2023	Priority:
Home Study Topics		
Topic	Status	
Basic Provider Information (Name, Household Members, Address and Contact, Caregiver)		
Amend/Update	Not Provided	
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	Not Available	
Assessment Visits	3 of Visits Linked	
Training Completed	Training Requirements Not Completed	
Acceptance Criteria Information	Characteristics Information - Record Exists / Usage Placement Criteria - Record Exists	
Recommendation	Pending	
<input type="button" value="Validate for Approval"/>		

10. Complete any Unresolved Tasks.

Unresolved Tasks	
Topic	Message
Safety Audit	All Safety Audit topics have not been addressed
Safety Audit	Date Safety Audit Was Conducted has not been entered
Home Study Recommendation Details	Question 'Do any of the listed verifications contain information that would disqualify applicant for program for which applied?' is not answered
Home Study Recommendation Details	Question 'Do any of the listed verifications (except the home study visits) contain information that would cause limitations/restrictions regarding the care of a foster or adopted child?' is not answered
Training Completed	Training requirements are not completed
Amend/Update	Amendment/Update Reason Information is missing
Verifications	Verification Information is incomplete
Description of Family	Description of Family record is missing
References	Reference Information is missing
Pending Recommendation	Recommendation has not been updated from 'Pending'
Level of Care	Recommending Agency is not currently certified to provide selected Level of Care.

11. Click the **Validate for Approval** button when finished.

<input type="button" value="Validate for Approval"/>
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Reviewing a Home Study Approved After Home Study Snapshot

1. Click the **View** link to select the **Home Study** you wish to review.

Home Study Filter Criteria

From Home Study Start Date:  To Home Study Start Date: 

Created in Error: Exclude Include

Filter

Maintain Home Study History

	Provider Type	Home Study Type	Start Date	Status	Recommendation	Recommendation Date	Agency
view edit copy report	Adoptive Care	Recertify/Update	09/18/2023	In progress	Pending	09/18/2023	Test County Children Services Board
view report	Adoptive Care	Initial	07/19/2023	Approved	Approve	08/25/2023	Test County Children Services Board

Add Initial Home Study

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

2. Select **Basic Provider Information** from the **Home Study Topics** list.

Maintain Home Study Information

Agency: Test County Children Services Board

Home Study Type: Initial Assessor:

Provider Type: Adoptive Care Level of Care:

Start Date: 07/19/2023 Priority:

Home Study Topics

Topic	Status
Basic Provider Information (Name, Household Members, Address and Contact, Caregiver)	
Verifications	Completed
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The **Provider Information** screen appears.

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Provider Information

Assessor Name: Test, Adult
 Agency: Test County Children Services Board
 Agency Address: 123 Test Rd, Test Oh, 12345
 Phone: (123) 456-7899
 Fax:

Member List

	Name/Person ID	Date of Birth	Role	Effective Date	Type	Estimated Leave Date
Stored Person Details	Test, Provider / 123	09/22/1974	Applicant 1	05/23/2023	Permanent	
Skills:						

3. Click **Stored Person Details** to view the **Home Study Snapshot** person details.
4. View the **Snapshot Reason** and **Snapshot Date**.

Snapshot Reason: Approved Home Study Snapshot Date: 08/25/2023 09:13:36 AM

Person Overview

- Profile
- Education
- Medical
- Employment
- Military
- Background
- Delinquency
- SACWIS History
- Relationships

PERSON NAME / ID:
Test, Provider / 123

123 Test Rd,
 Test Oh, 12345

ENVIRONMENTAL HAZARDS:
PROVIDER

RACE: *White*
 HISPANIC / LATINO: *No*
 HAIR COLOR:
 EYE COLOR:

AKA Names

Prefix	First Name	Middle Name	Last Name	Suffix	AKA Type

Other Addresses

Type	Address	Hazard
Work1		No

ICWA

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

[Close](#)

5. Click through the tabs to view additional **Home Study Snapshot** person detail information.
 - The **Home Study Snapshot** allows users to view the following information: **Basic, Employment, Military, Demographics, Address, Add'l,** and **Background** tabs.
 - All other information in not available for viewing.
6. Click the **Close** button.

The **Provider Information** screen appears.

