

Accessing Agency Account and Staff Personnel Information



Knowledge Base Article

Accessing Agency Account and Staff Personnel Information

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Accessing Agency Account and Staff Personnel Information

Overview

This article describes how to access your Agency Account information, view, and add Personnel Information, and submit a background check within the Ohio Certification for Agencies and Families (OCAF) system.

Getting Started

To gain access to the OCAF system, you must submit a completed JFS 7078 to SACWIS_Access@jfs.ohio.gov. Enter the appropriate role on the form based on the type of agency you are employed by and the role(s) you serve within that agency:

Role Name	Agency Type Access
EIDMX_JFS_S - OFC – OCAF Private Agency Worker	Private Agency
EIDMX_JFS_C - OFC – OCAF County Agency Worker	Public Agency
EIDMX_JFS_S - OCAF Agency Board President	Private Agency
EIDMX_JFS_C - OCAF Agency Director	Public Agency
EIDMX_JFS_S - OCAF Agency Administrator	Private Agency
EIDMX_JFS_C - OCAF Agency Administrator	Public Agency
EIDMX_JFS_S - OCAF Agency Supervisor	Private Agency
EIDMX_JFS_C - OCAF Agency Supervisor	Public Agency
EIDMX_JFS_S - OCAF OHMAS	Private Agency
EIDMX_JFS_S - OCAF Home Study Assessor	Private Agency
EIDMX_JFS_C - OCAF Home Study Assessor	Public Agency
EIDMX_JFS_S - OCAF Branch/Facility Supervisor	Private Agency

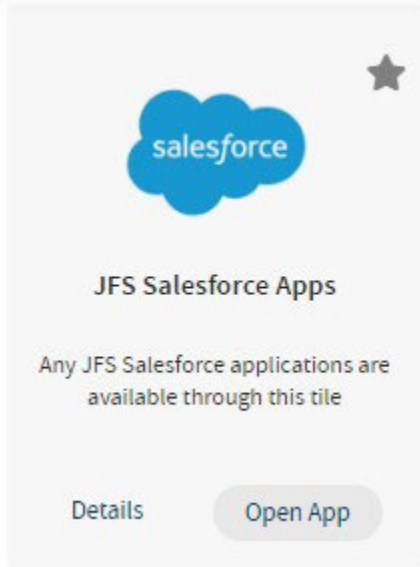
Private agency users will require a paper 7078 to be submitted while the digital 7078 can be utilized by public agencies users. Upon approval, an email will be sent by the Automated Systems Help Desk with details on how to log-in to OCAF. A link to the 7078 Form can be accessed by clicking the link below:

[JFS 7078 Form](#)

MyOhio Access

After the user is properly provisioned for access to OCAF, begin by accessing MyOhio using your SUID and your password. Navigate to the My Apps through My Workspace. Locate and click on the tile for JFS Salesforce Apps.

Accessing Agency Account and Staff Personnel Information

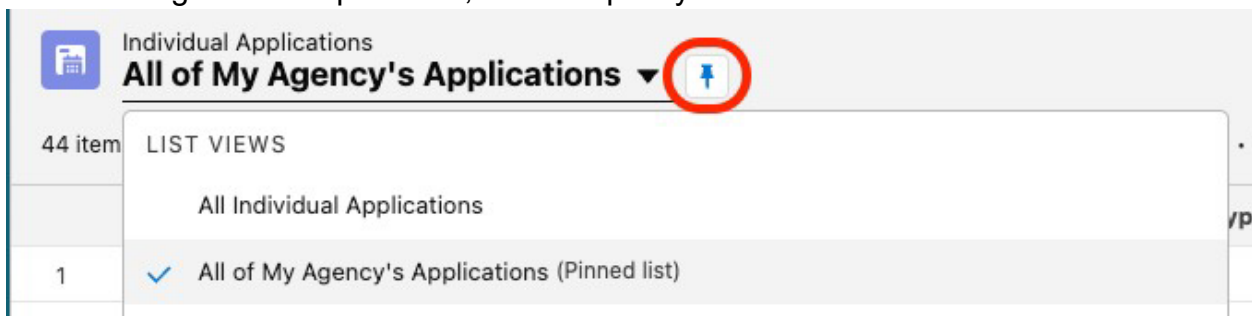


Helpful Hints About the OCAF System

- If you have other Salesforce applications, please use the app launcher to navigate to OCAF.



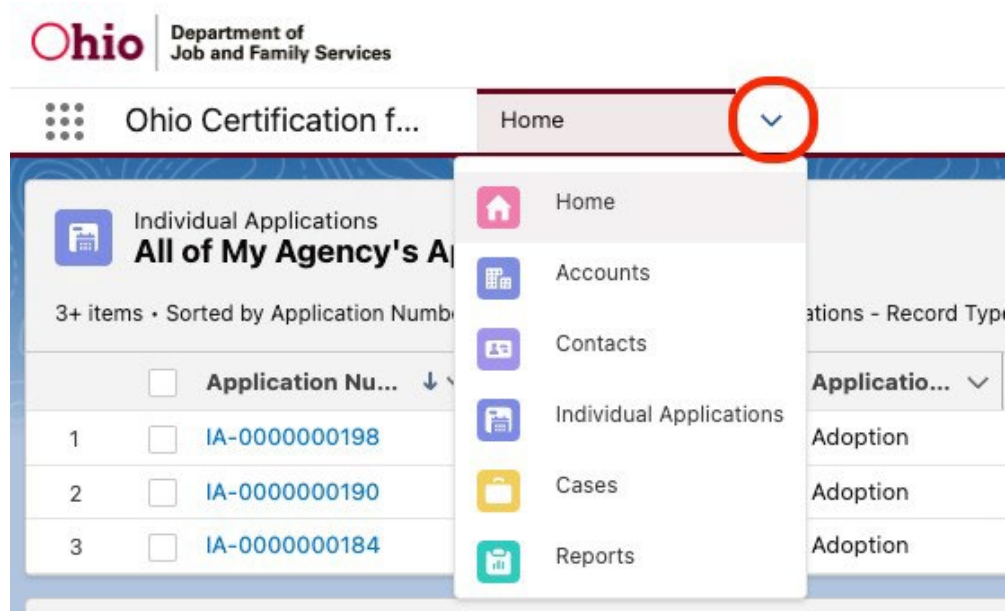
- You may use the web browser back arrow button to return to the previous screen or navigate between record tabs within Salesforce.
- All items in blue font contain a hyperlink to something else. Click on it to navigate to the corresponding information page.
- The **Home** dropdown menu contains a list view that can be changed and pinned for your convenience. The drop-down arrow next to the list can be changed. To keep that list, click the pin symbol.



Accessing Agency Account and Staff Personnel Information

Navigating OCAF

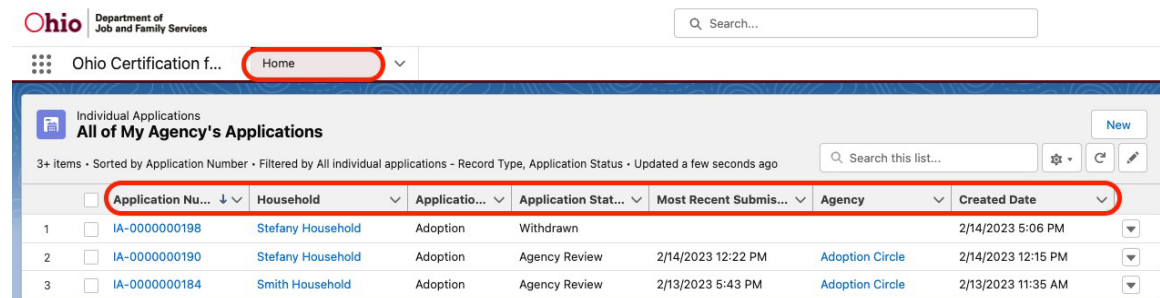
After logging into the system, the tabs at the top will guide you through the different work items in OCAF.



Home Tab

The **Home** page will be the initial screen presented each time you log into OCAF. It will display:

The list of **Child Placement Applications** (commonly known as the JFS 01691) submitted to your agency.

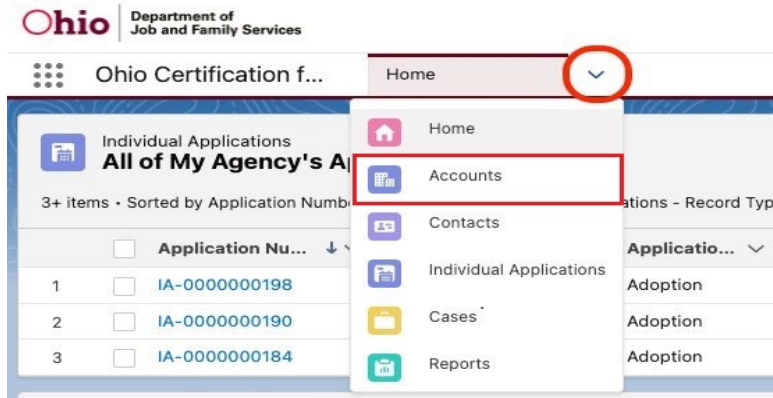


Accounts Tab

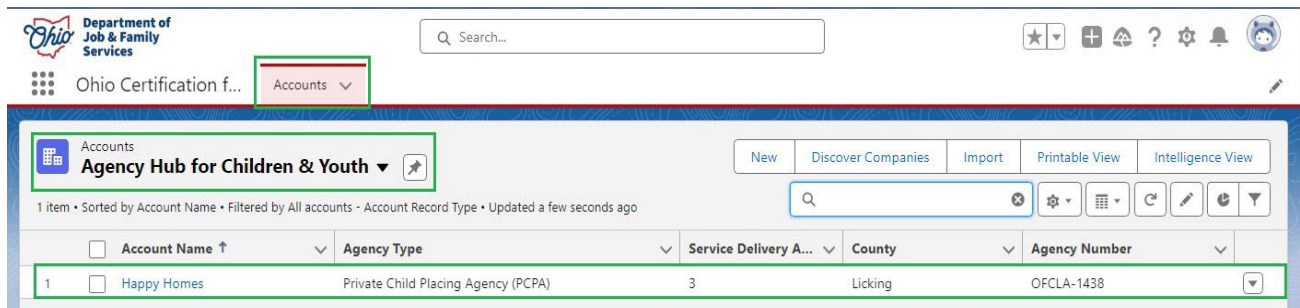
The **Accounts** tab will display your **Agency Account**. Here is where you can **View** and **Edit** your agency and **Add Contacts**.

1. From the **Home** dropdown menu, select **Accounts**.

Accessing Agency Account and Staff Personnel Information

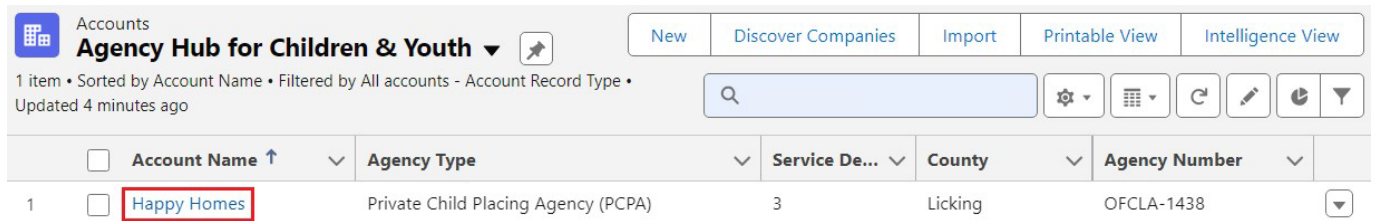


The **Accounts** screen appears displaying your **Account Name**, **Agency Type**, **Service Delivery Area**, **County** and **Agency Number**. See below:



Viewing your Agency

1. To view your **Agency Information**, click the **Account Name** link.



Your **Account** screen appears, displaying all of your **Account Information**. The screen defaults to the **Details Tab**.

Accessing Agency Account and Staff Personnel Information

Account

Happy Homes

+ Follow

New Event

New Note

Sharing

Agency Type

Certified

County

Agency Email

Private Child Placing Agency (PCPA)

Licking

testing@gmail.com

Details

Related

Agency Email

testing@gmail.com

Beginning of Continuous Certification

1/1/2024

Accreditation Agency

Healthy Families America

Accreditation Date

1/1/2024

4. Children's Crisis Care Facilities

☐

5. Residential Infant Care Center(s)

☒

Activity

Chatter

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No activities to show.

Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

Note: The  icon indicates those fields are **Editable**.

Accessing Agency Account and Staff Personnel Information

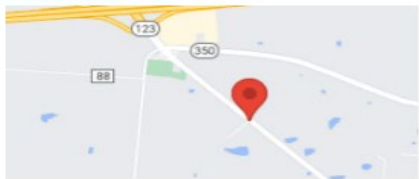
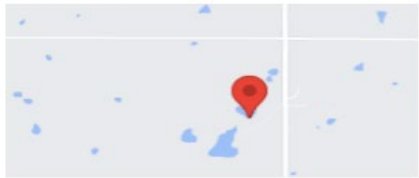
▼ Agency Information

Agency Number OFCLA-1438	Account Record Type Agency Hub for Children & Youth
Account Name Happy Homes	Account Owner Lisa Oliver
Agency Acronym	Active in PCSA Exit Survey <input type="checkbox"/>
Agency Type Private Child Placing Agency (PCPA)	Accepts Adoption/Foster Apps & Inquiries <input type="checkbox"/>
Service Delivery Area (SDA) 3	Active in TEAM Ohio <input type="checkbox"/>
Fiscal Year	Restricted ⓘ <input type="checkbox"/>
Fiscal Starting Month	Is this an adoption agency? ⓘ <input type="checkbox"/>
Fiscal Ending Month	OCAF Licensing Region
Phone ⓘ	Exit Survey Region
Fax	Size of PCSA
Inquiry Primary Email ⓘ	Parent Account
Agency Description Test Narrative. Happy Homes provides residential care for children since 1/2024.	Inquiry Secondary Email ⓘ

▼ Additional Visit Dates

Additional Visit Start Date ⓘ	Additional Visit End Date

▼ Address



County Licking	Business Address 123 Happy St Test, Ohio 12345 United States
	
	Mailing Address United States
	

Accessing Agency Account and Staff Personnel Information

▼ Agency Certification	
Certified ⓘ	Beginning of Initial Certification Span ⓘ
Certification Status ⓘ	End of Initial Certification Span ⓘ
Closure Type ⓘ	Closure Date ⓘ

▼ QRTP Compliance	
QRTP Compliant ⓘ	QRTP Compliance Effective Date ⓘ
QRTP Comments ⓘ	QRTP Compliance End Date ⓘ

▼ Functions	
1. Children's Residential Center(s) <input type="checkbox"/>	8. Pre-adoptive Infant FH Certification <input type="checkbox"/>
2. Group Home(s) <input type="checkbox"/>	9. Custody of Children <input type="checkbox"/>
3. Residential Parenting Facilities <input type="checkbox"/>	10. Place Children <input type="checkbox"/>
3. Residential Parenting Facility (GH) <input type="checkbox"/>	11. Participate in Placement FH <input type="checkbox"/>
4. Independent Living Arrangements <input type="checkbox"/>	12. Participate in Placement Adopt <input type="checkbox"/>
5. Family FH Certification <input type="checkbox"/>	13. CCCF (CRC) <input type="checkbox"/>
6. Treatment Foster Home Certifications <input type="checkbox"/>	13. CCCF (GH) <input type="checkbox"/>
7. Medically Fragile Foster Homes Cert <input type="checkbox"/>	14. PNTWC <input type="checkbox"/>

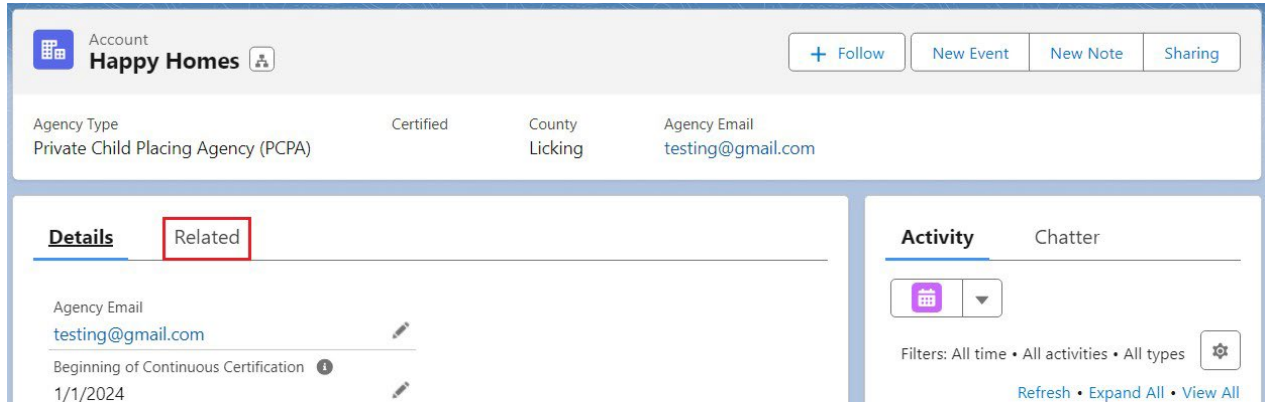
▼ System Information	
Created By  Lisa Oliver , 4/1/2024 1:06 PM	Last Modified By  Lisa Oliver , 4/1/2024 1:08 PM


▼ SACWIS Information	
SACWIS Agency ID ⓘ	Public Agency <input type="checkbox"/>
SACWIS Party ID ⓘ	COA <input type="checkbox"/>
SACWIS Phone Ext ⓘ	Inactive <input type="checkbox"/>
SACWIS Home Phone Ext ⓘ	CWLA <input type="checkbox"/>

You can **Edit** any fields marked with **Edit Icon** on this page at any time.

Accessing Agency Account and Staff Personnel Information

2. Click the **Related** Tab.






Account **Happy Homes** 

[+ Follow](#) [New Event](#) [New Note](#) [Sharing](#)



Agency Type: Private Child Placing Agency (PCPA) Certified County: Licking Agency Email: testing@gmail.com


Details **Related**

Agency Email: testing@gmail.com 

Beginning of Continuous Certification  1/1/2024 

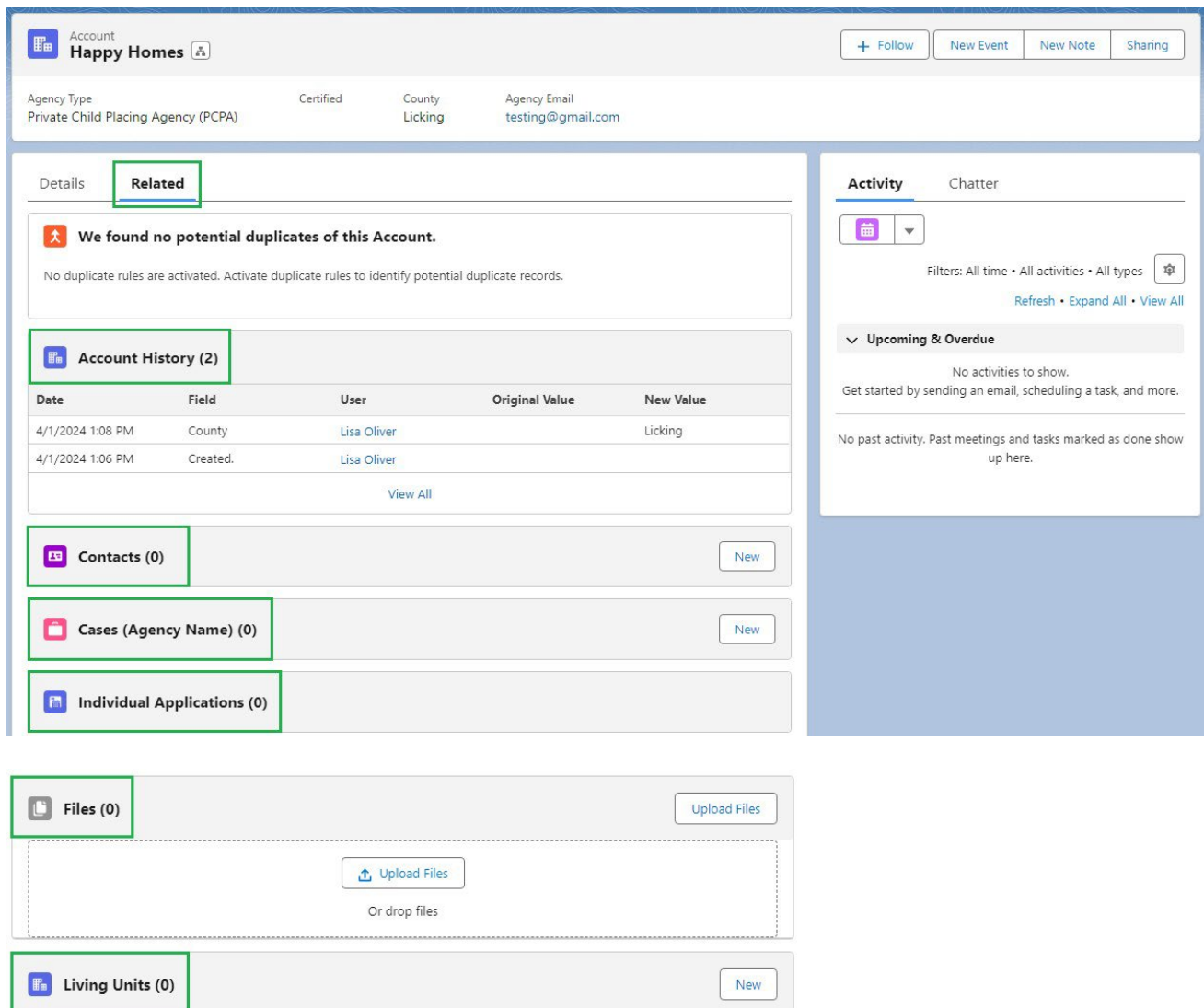
Activity Chatter


 

Filters: All time • All activities • All types 

[Refresh](#) • [Expand All](#) • [View All](#)

The **Related** Tab screen appears displaying **Account History**, **Contacts**, **Cases**, **Individual Applications**, **Files** and **Living Units**.




Account **Happy Homes** 


[+ Follow](#) [New Event](#) [New Note](#) [Sharing](#)

Agency Type: Private Child Placing Agency (PCPA) Certified County: Licking Agency Email: testing@gmail.com

Details **Related**


 **We found no potential duplicates of this Account.**


No duplicate rules are activated. Activate duplicate rules to identify potential duplicate records.


 **Account History (2)**


Date	Field	User	Original Value	New Value
4/1/2024 1:08 PM	County	Lisa Oliver		Licking
4/1/2024 1:06 PM	Created.	Lisa Oliver		

[View All](#)

 **Contacts (0)** [New](#)


 **Cases (Agency Name) (0)** [New](#)

 **Individual Applications (0)**

 **Files (0)** [Upload Files](#)

[Upload Files](#)

Or drop files

 **Living Units (0)** [New](#)

Accessing Agency Account and Staff Personnel Information

Adding a New Contact

1. Within the **Contacts** section, click the **New** button.

Ohio Certification f... Accounts

Account
Happy Homes

+ Follow New Event New Note Sharing

Agency Type: Private Child Placing Agency (PCPA) Certified: County: Licking Agency Email: testing@gmail.com

Details **Related**

We found no potential duplicates of this Account.
No duplicate rules are activated. Activate duplicate rules to identify potential duplicate records.

Account History (2)

Date	Field	User	Original Value	New Value
4/1/2024 1:08 PM	County	Lisa Oliver		Licking
4/1/2024 1:06 PM	Created	Lisa Oliver		

[View All](#)

Contacts (0) **New**

Activity Chatter

Filters: All time • All activities • All types

[Refresh](#) • [Expand All](#) • [View All](#)

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

A box appears requiring a **New Contact Record Type**.

2. Select **Personnel for Children & Youth** for the **Contact Type**.
3. Click the **Next** button.

New Contact

Select a record type

- ☐ Case OFC Policy HelpDesk
- ☐ APS Contact
- ☐ Agency Administrator
Agency Administrator - Foster Care Licensing
- ☐ Board Member
Board Member - Foster Care Licensing
- ☐ Case Management
Case_Management
- ☐ Community User Contacts
Used for the Community User Contacts ONLY
- ☐ DRMS Media Reporter
Media Reporter List for DRMS Communications Team
- ☐ OCAF Agency Contact
- ☐ OCAF Applicant
- ☐ OFA-CCIDS Contact Layout
OFA-CCIDS Contact Layout
- ☐ OFC Customer Care Center Contact
Contact record type for OFC Customer Care Center
- ☐ OWD Contact
Contact record type for OWD CRM
- ☒ **Personnel for Children & Youth**
Personnel for Children & Youth

[Cancel](#) **Next**

Accessing Agency Account and Staff Personnel Information

A box appears requiring you to fill out the **Personnel Information** for the **New Contact**.

New Contact: Personnel for Children & Youth

* = Required Information

Personal Information

<p>* Name</p> <p>Salutation --None--</p> <p>First Name First Name</p> <p>Middle Name Middle Name</p> <p>* Last Name Last Name</p> <p>Complete this field.</p> <p>Suffix Suffix</p> <p>* Phone </p> <p>* Email </p>	<p>Mailing Address</p> <p>Search Address</p> <p>Mailing Country United States</p> <p>Mailing Street </p> <p>Mailing City Mailing State/Province --None--</p> <p>Mailing Zip/Postal Code </p> <p>* County --None--</p> <p>* Account Name Happy Homes</p>
--	--

1. Provide the New Contacts **First** and **Last Name**.
2. Provide **Phone Number**.
3. Provide **Email**.
4. Fill out **Address**.
5. Make a selection from the **County** dropdown menu.
6. **Account Name** is auto filled with your Account Name.

Demographic Information

<p>* Date of Birth </p> <p>* Gender --None--</p>	<p>Race --None--</p> <p>* Ethnic Background (Hispanic/Latino) --None--</p>
--	---

Employment Information

<p>* Agency Job Title --None--</p> <p>Job Description </p> <p>* Hire Date </p> <p>Ohio SACWIS Employee ID </p>	<p>* Employment Type --None--</p> <p>Federation/OH ID </p> <p>End of Employment Date </p> <p>Ohio SACWIS Person ID </p>
--	--

Accessing Agency Account and Staff Personnel Information

7. Fill out the **Date of Birth** field.
8. Make a selection for **Gender** from the dropdown menu.
9. Make a selection for **Ethnic Background** (Hispanic/Latino).
10. Make a selection for **Agency Job Title**.
11. Make a selection for **Employment Type**.
12. Fill out the **Date of Hire** field.

Additional Background Search Dates

National Sex Offender Search Date

Findings of Recovery Search Date

Ohio Alleged Perpetrator Search Date

SAMS Search Date

Additional AP Search Required?

☐

Contact Record Type

Personnel for Children & Youth

Contact Owner

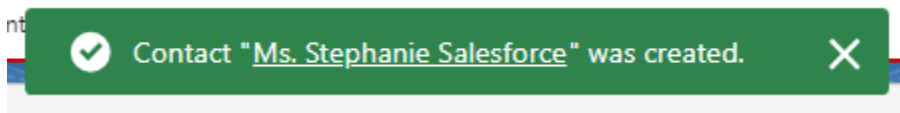
Lisa Oliver

Cancel Save & New Save

13. Click the **Save** button. **OR**
14. If adding more than one **New Contact**, you may click the **Save & New** button to create another contact within your Agency.

Note: All fields marked with an * are required.

A **Validation Message** will appear verifying your **New Contact** has been created.



Within the **Related Tab** you will now see your **New Contact** listed.

Note: After save, the contact screen will open in a new tab right next to your related tab. It will be the new contact you just entered. See image below. You can click on the account name related tab to return to your previous screen.

Accessing Agency Account and Staff Personnel Information

Choosing Hope ...

Frank Sin... ▼ ×

Contact

Mr. Frank Sinatra

Agency Job Title

Supervisor

Phone

(456) 789-1230

County

Carroll

Details

Background Checks

Personnel History

Background Checks (0)

Click on the **Account Name** to return to the **Related Tab**.

Details

Related

We found no potential duplicates of this Account.

No duplicate rules are activated. Activate duplicate rules to identify potential duplicate records.

Account History (2)

Date	Field	User	Original Value	New Value
4/1/2024 1:08 PM	County	Lisa Oliver		Licking
4/1/2024 1:06 PM	Created.	Lisa Oliver		

View All

Contacts (1)

New

Stephanie Salesforce

OFCL...

OFCL...

Cont... Personnel for Childr...

View All

Accessing Agency Account and Staff Personnel Information

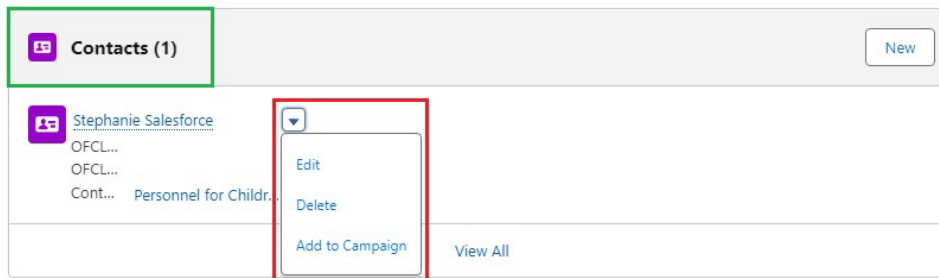
Editing a Contact

Once your **New Contact** is created, you may **Edit** at any time.

1. From the **Related Tab**, click the **dropdown** button next to the appropriate **Contact**.

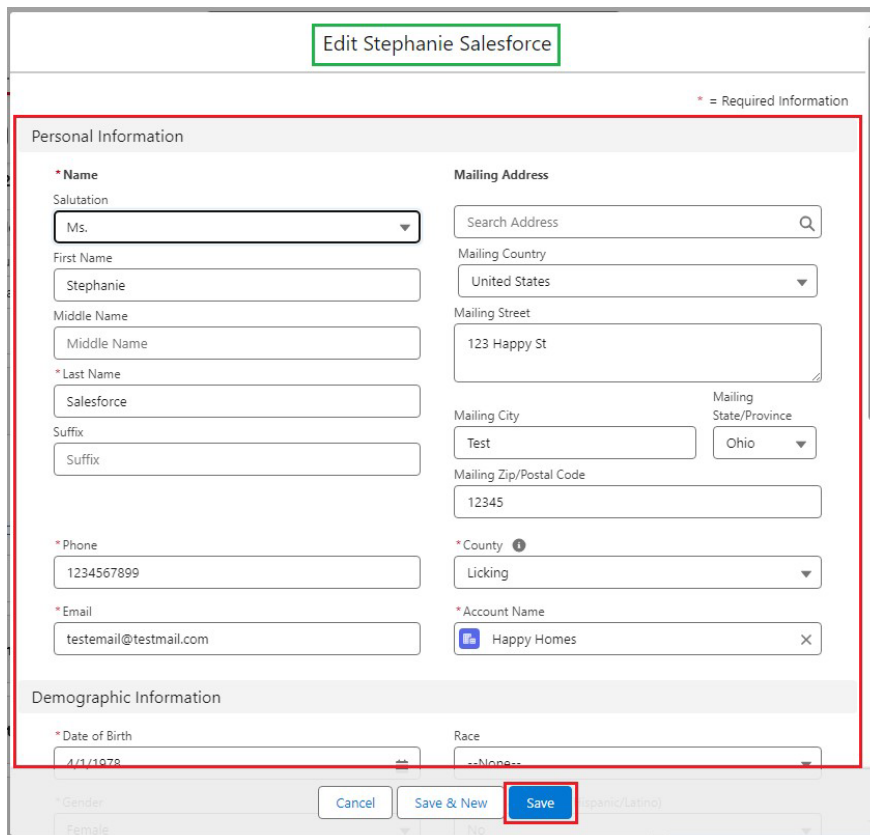
Note: You can select **Edit**, **Delete** or **Add to Campaign**.

2. Select **Edit**.



The screenshot shows a 'Contacts (1)' header with a 'New' button. Below is a list of contacts. The first contact, 'Stephanie Salesforce', is highlighted. A dropdown menu is open next to her name, showing three options: 'Edit', 'Delete', and 'Add to Campaign'. The 'Edit' option is highlighted in blue. The contact details for Stephanie Salesforce are partially visible: 'OFCL...', 'OFCL...', and 'Cont... Personnel for Childr...'. A 'View All' link is also present.

A box appears displaying the **Contacts Personnel Information**.

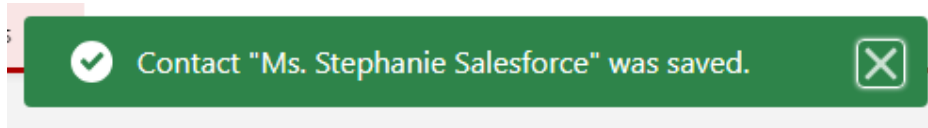


The screenshot shows the 'Edit Stephanie Salesforce' form. The form is divided into two main sections: 'Personal Information' and 'Demographic Information'. The 'Personal Information' section includes fields for Name (Salutation, First Name, Middle Name, Last Name, Suffix), Mailing Address (Search Address, Mailing Country, Mailing Street, Mailing City, Mailing State/Province, Mailing Zip/Postal Code), Phone, Email, and Account Name. The 'Demographic Information' section includes fields for Date of Birth, Race, and Gender. The 'Save' button is highlighted in blue. The form also includes a 'Cancel' button and a 'Save & New' button. A legend indicates that '*' denotes required information.

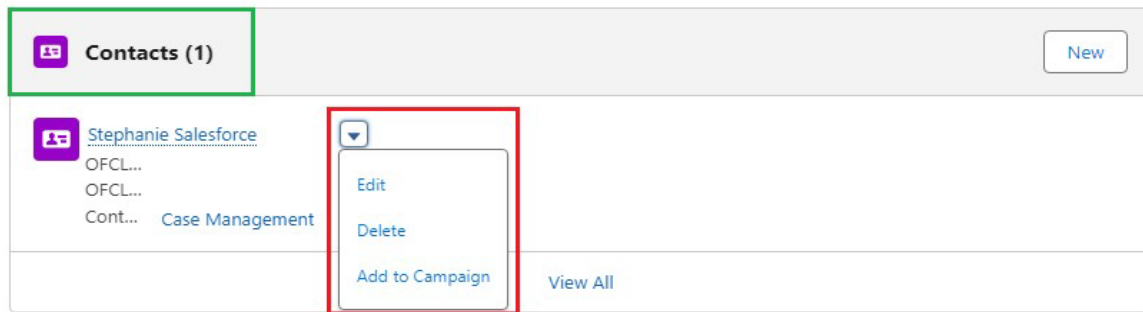
3. When done **Editing**, click the **Save** button.

Accessing Agency Account and Staff Personnel Information

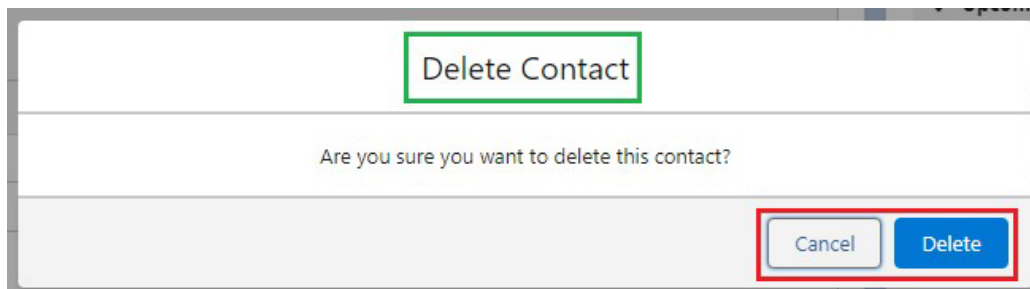
A **Validation Message** will appear verifying the contact was **Saved**.



4. If you need to **Delete** the **Contact**, select **Delete** from the **dropdown** menu.



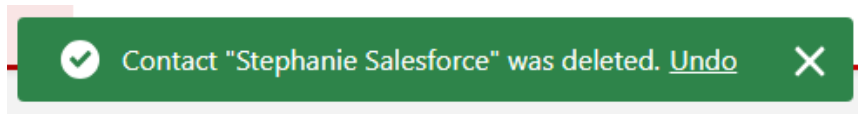
A box will appear verifying if you want to **Delete** the **Contact**.



5. Click **Delete** to permanently **Delete** the **Contact** from your Agency. **OR**

6. Click the **Cancel** button to exit out the Delete Contact Box.

A **Validation Message** will appear verifying the **Contact** was **Deleted**.

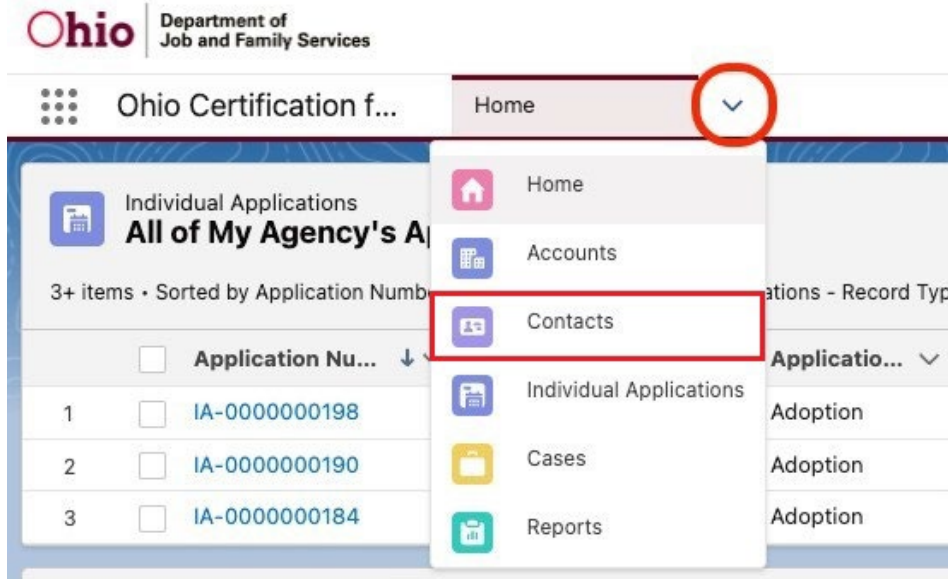


Contacts Tab

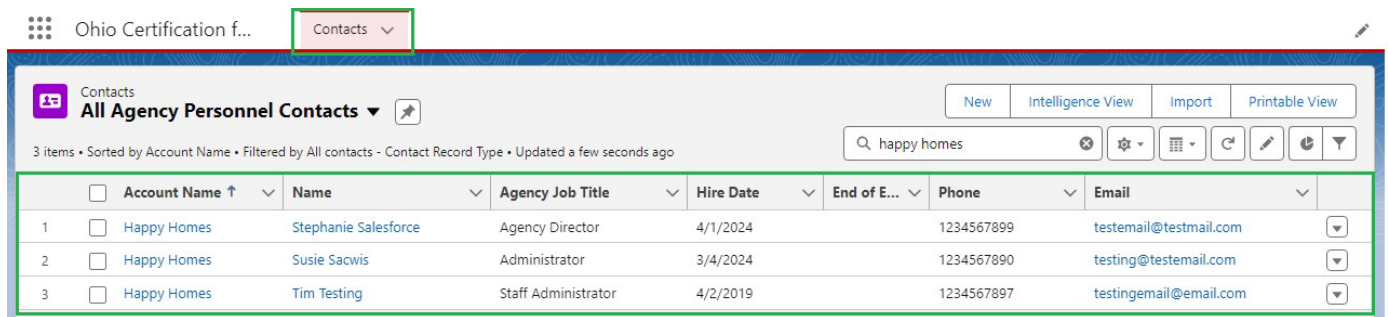
The **Contacts Tab** will display the **Names**, **Contact Email**, **Account Name** and **Person ID** for **Personnel** listed within **Your Agency**. You have the option to add new contacts to your agency from this tab as well as from the Accounts tab. (Previously Reviewed)

1. From the **Home** dropdown menu, select **Contacts**.

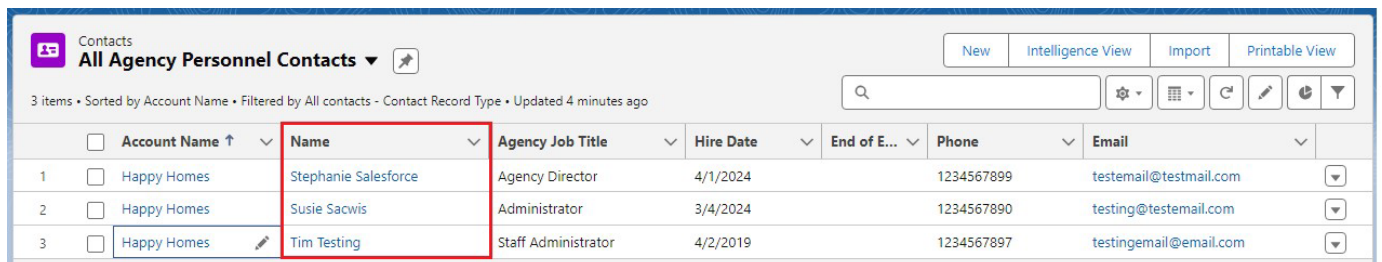
Accessing Agency Account and Staff Personnel Information



The **All Agency Personnel Contacts** screen appears.



2. To **Edit** any information on a contact, click the dropdown arrow on the right hand side and select **edit**.
3. You can click the dropdown button at the end of the grid to **Edit**, **Delete** or **Change Owner** for the **Contact**. Shown in red above.
4. You can **Add** a **New Contact** directly from this page by clicking the **New** button.
5. You can **View and edit** the **Contacts Personnel Information** by clicking the **Name** link.



Accessing Agency Account and Staff Personnel Information

You will be taken to the **Background Checks** screen and can **add Background checks from here**.

You can also then click on the **Details** tab to edit any information about the **contact**.

The screenshot shows the 'Details' tab for a contact named Ms. Stephanie Salesforce. The contact's name is highlighted with a green box. In the top right corner, there are buttons for 'Change Record Type', 'Edit', and 'Delete', with the 'Edit' button highlighted by a red box. The contact's information includes: Agency Job Title (Agency Director), Phone ((123) 456-7899), and County (Licking). The 'Personal Information' section is expanded, showing Name (Ms. Stephanie Salesforce), Mailing Address (123 Happy St, Test, Ohio 12345, United States), and a map. The 'Demographic Information' section is also visible. The 'Activity' tab on the right shows no upcoming or overdue activities.

Background Checks Tab

The **Background Checks** tab allows you to submit a **Background Check** request for **New Contacts, New Employees in Your Agency**.

1. From the **Contacts** screen, click on the **Name** to access the **Background check** tab.

The screenshot shows a table of 'All Agency Personnel Contacts'. The table has columns for Account Name, Name, Agency Job Title, Hire Date, End of E..., Phone, and Email. The 'Name' column is highlighted with a red box. The table contains three rows of data.

	Account Name ↑	Name	Agency Job Title	Hire Date	End of E...	Phone	Email
1	Happy Homes	Stephanie Salesforce	Agency Director	4/1/2024		1234567899	testemail@testmail.com
2	Happy Homes	Susie Sacwis	Administrator	3/4/2024		1234567890	testing@testemail.com
3	Happy Homes	Tim Testing	Staff Administrator	4/2/2019		1234567897	testingemail@email.com

The **Screen** defaults to the **Background checks** Tab for that contact.

Accessing Agency Account and Staff Personnel Information

Contact
Mr. Frank Sinatra

Agency Job Title: Supervisor | Phone: (456) 789-1230 | County: Carroll

Details | **Background Checks** | Personnel History

Background Checks (0)

Create a New Background Check

1. Click the **Create background Check** button on the **Background Checks** screen.

Contact
Mr. Frank Sinatra

Agency Job Title: Supervisor | Phone: (456) 789-1230 | County: Carroll

Details | **Background Checks** | Personnel History

Background Checks (0)

Create Background Check

A box appears requiring you to fill out information for the **Background Check**.

Create Background Check

Background Check Details

* Required

Criminal Record Check Type: *

Choose Values

Complete this field.

Date of Background Check: *

MM/DD/YYYY

Receipt Date: *

MM/DD/YYYY

Files

Attach Supporting Document(s): Allowed file types are - pdf, png, doc, docx, pages, csv, ppt, pps, pptx, xml, xlsx, xls, xlr.

Attachments (Max file size for each file is 2 GB)

Upload Files Or drop files

Submit

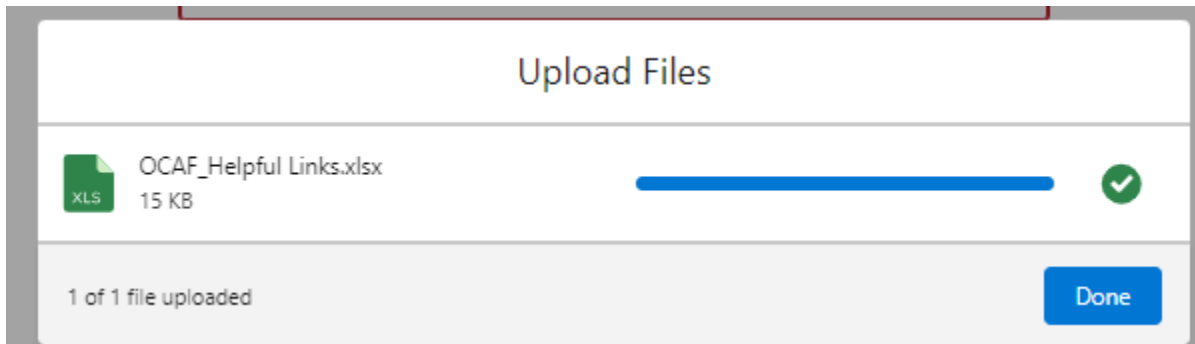
2. Make a selection for the **Criminal Record Check Type** dropdown box.

Accessing Agency Account and Staff Personnel Information

3. Select the date the Background Check was completed in the **Date of Background Check**.

Type the date you received the **Background Check** into the **Receipt Date Box**

4. Click on the **Upload Files** button.
5. Find the correct **Background Check** on your computer that you wish to upload for this contact.
6. Click **Open** to start the upload.
7. Once upload is completed, select the **Done** button.



8. Scroll down to select the **Submit** button.

You will receive a message on your screen that the **Background Check** record was uploaded successfully. Click **Close**.

To enter another **Background Check**, follow same steps. To close that Contact, click the **X** next to the Contact Name in top tab bar.

If you need additional information or assistance, please contact the JFS DCY Customer Care Center at <https://odjfs2.my.site.com/CustomerCareCenter> .