

# **Closing a Kinship Provider Record**



**Knowledge Base Article**

# Closing a Kinship Provider Record

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## Closing a Kinship Provider Record

### Overview

This article describes the process of closing a Kinship Provider Record once it is no longer needed for placement. The two scenarios detailed include:

1. Closing a record prior to completion and/or child placement (if caregiver withdrew, placement was no longer needed, assessment denied, etc.) Instructions for completing tasks begin with the section, **Closing a Kinship Provider Without a Complete Kinship Assessment**.
2. Closing a record after a child has been placed. Instructions for this begins with the section, **Closing the Kinship Provider Type**.

**Important:** Prior to closing any Kinship Assessment, Provider Type or Provider Status:

- Check the **Placements/Services** link to ensure there are no current placements listed in the Provider record. Any active placements will need to be end-dated prior to beginning the closing process.
- All activity logs will need to be in 'Completed' status
- All household members need to have the appropriate role and relationships entered (i.e. – anyone aged 18 and above should be listed as an Adult Household member).

### Navigating to the Kinship Provider Record

1. From the Ohio SACWIS **Home** screen, click the **Provider** tab.
2. Click the **Workload** tab.
3. Click the username to expand the list of providers.
4. Click, **select** beside the name of the relevant **Provider ID**.

Home	Intake	Case	Provider	Financial	Administration		
Workload	Provider Search	Provider Match	Recruitment	Inquiry	Training	Contracts	Agency Certifications
KCCP Pre-Screening Tool							
Workload							
Provider Worker:		All Provider Workers					
Sort By:		Provider Name (Ascending)				Filter	
Test, Worker (49 Providers)							
Provider ID	Provider Name	Provider Status	Provider Type	Type Status	Approval/Certification Period	Primary Address	
select 121212	Test, Provider	Active	Foster Care	Certified	11/22/2022 - 11/21/2024		
select 111111	Test, Provider	Active	Adoptive Care Foster Care	Application Received Application Received			

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

## Closing a Kinship Provider Record

### Closing a Kinship Provider Without a Complete Kinship Assessment

You will need to dispose of the Kinship Assessment record to begin the process of closing the Kinship Provider.

1. Click, **Kinship Assessment**, in the navigation menu.

**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
- Large Family Assessment
- Kinship Assessment**

PROVIDER NAME / ID: Test, Provider / 121212

CATEGORY / STATUS: Home / Active

PRIMARY ADDRESS: 123 Test Rd, Test, Oh 12345

PRIMARY CONTACT: Home:

**Provider Actions**

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

**Approval/Certification Spans**

Provider Type	Level of Care	Approval/Certification Period	Agency	Certifying Entity
Foster Care	Family Foster Home	11/22/2022 - 11/21/2024	County Children Services Board	ODJFS

The **Kinship Assessment** page appears.

2. Click **edit** next to the relevant child's name.

**Kinship Assessment Filter Criteria**

Kinship Assessment Start Date: [From Date] - [To Date]

Child Name: [Dropdown]

Include Created in Error

**Filter**

**Kinship Assessments**

Result(s) 1 to 3 of 3 / Page 1 of 1

	Child Name	Assessment Type - Date	Provider Types	Status	Recommendation - Date	Letter Sent	Agency
<b>edit</b>		Initial - 08/01/2018	Kinship Care - Relative	In Progress	Pending		
<b>edit</b>		Initial - 08/01/2018	Kinship Care - Relative	In Progress	Pending		
<b>edit</b>		Initial - 08/01/2018	Kinship Care - Relative	In Progress	Pending		

The **Add Kinship Assessment** screen appears.

3. Select **Worker** from the drop-down menu.
4. Select the **Purpose of Assessment** from the drop-down menu.
5. Select the Caregiver from the **Caregiver #1** drop-down menu.
6. Click **Save**.

## Closing a Kinship Provider Record

The Maintain Kinship Assessment screen appears.

### Denying a Kinship Assessment

If the **Agency Recommendation** is to **Deny** the Kinship Assessment, all **Kinship Assessment Topics** are required to be completed prior to supervisory approval. Details on completion of each link can be found in the Knowledge Base article [Completing a Kinship Home Assessment](#). After final approval of the denied kinship approval, proceed to instructions below on Closing the Kinship Provider Type.

### Closing a Kinship Assessment

**Note:** If the **Agency Recommendation** is **Close**, Ohio SACWIS does not require completion of all Kinship Assessment Topics.

1. Click the **Agency Recommendation** link from the **Kinship Assessment Topics**.

Topic	Status
<a href="#">Caregiver / Household Information</a>	
<a href="#">Background Checks</a>	0 of 7 Answer(s) Provided
<a href="#">Safety Checks</a>	0 of 9 Answer(s) Provided
<a href="#">Caregiver / Household Member Assessment</a>	0 of 4 Answer(s) Provided
<a href="#">Caregiver Assurance</a>	Not Complete
<a href="#">Agency Recommendation</a>	Pending

The **Agency Recommendation** screen appears.

## Closing a Kinship Provider Record

2. Complete all **Agency Recommendation Statements**, selecting the appropriate response from each drop-down menu. Selecting **No** to questions will not prevent approval of the closure.
3. Select, **Close**, from the **Agency Worker Recommendation** drop-down menu. This causes the **Closure Reasons** drop-down menu to appear.
4. From the **Closure Reasons** drop down, choose the most appropriate response. These include:
  - **Created in Error** – This reason should only be used in circumstances where the kinship assessment was erroneously created - i.e. – the family never intended to be considered for placement of this specific child or the wrong child of interest was chosen on the inquiry.
  - **Caregiver Withdrew** – Used when a family begins the process of assessment but then decides they no longer wish to become a kinship resource.
  - **Other** – Will cover any circumstances that don't fit the other reasons for closure, such as the caregiver passed away. If this reason is selected, comments are required in the **Comments on Agency Recommendation** text box.
  - **Placement Not Needed** – This reason would be used for circumstances such as the child being returned to parental custody.
5. Enter an **Agency Worker Signature Date**
6. If **Other** is selected, you will need to provide comments in the **Comments on Agency Recommendation** text box.
7. Click **Save**.

Agency Recommendation

Agency Recommendation Statements	Response
Worker has assessed the physical environment, the capability of the relative/nonrelative to care for the child(ren), and the best interest, safety, well-being, and permanency needs of the child(ren).	No ▼
Worker has provided caregiver with information on applying for OWF child-only and Medicaid.	No ▼
Worker has provided caregiver with known information regarding education, medical, child care, and special needs of the child(ren), including information on how to access support services to meet the needs of the child (if child is in agency custody).	N/A ▼
Worker has provided caregiver with the following information: <ul style="list-style-type: none"> <li>the requirements for foster caregiver certification and adoption approval and how those requirements differ from the requirements for approval as a relative or nonrelative substitute caregiver;</li> <li>how to apply for certification as a foster caregiver;</li> <li>the difference in payments between an OWF-child only payment and the foster care per diem; and</li> <li>the difference (if any) in the eligibility for supportive services (if child is in agency custody).</li> </ul>	N/A ▼
Worker will provide caregiver with a copy of the individual child care agreement per rule 5101.2-42-90 (if child is in agency custody)	N/A ▼

Agency Worker Recommendation:  
 Close ▼

Closure Reasons:  
 Caregiver Withdrew ▼

Agency Worker Signature Date:  
 01/09/2020

Date Letter Sent:

Agency Supervisor Recommendation:  
 In Progress

Agency Supervisor Signature Date:

Comments on Agency Recommendation: [\(expand full screen\)](#)

Required if Closure Reason of 'Other' is chosen, optional for any other reason.

ABC  
919

Apply
Save
Cancel

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Last Revised: 11/20/2023

## Closing a Kinship Provider Record

The **Maintain Kinship Assessment** screen appears.

Supervisory approval is still required to complete the closure of a Kinship Assessment.

1. Click, **Validate for Approval**.

Kinship Assessment Information		
Kinship Assessment Start Date: 11/06/2019	Assessment Type / ID: Initial /	Worker:
Kinship Assessment Topics		
<i>In accordance with rule 5101:2-42-18 (M), a home assessment shall be completed on an annual basis. Background check shall be required on any new adults in the home and the Safety Check shall be conducted when the caregivers moves to a new residence.</i>		
Topic	Status	
<a href="#">Caregiver / Household Information</a>		
<a href="#">Background Checks</a>	0 of 7 Answer(s) Provided	
<a href="#">Safety Checks</a>	0 of 9 Answer(s) Provided	
<a href="#">Caregiver / Household Member Assessment</a>	0 of 4 Answer(s) Provided	
<a href="#">Caregiver Assurance</a>	Not Complete	
<a href="#">Agency Recommendation</a>	Pending	
<a href="#">Validate for Approval</a>		

**Important:** If any part of the closing process is incomplete, the **Validate Kinship Assessment Tasks** screen will appear (graphic below), displaying a list of issues that need to be addressed.

Unresolved Tasks	
Topic	Message
Background Checks	Conditions met response is missing.
Background Checks	BCI Criminal Record date(s) is missing.
Background Checks	FBI Criminal Record date(s) is missing.
Background Checks	SACWIS Search date(s) is missing.
Background Checks	Convicted or plead guilty response is missing.
Background Checks	Felony conviction response is missing.
Background Checks	Date of review of the National Sex Offender Registry is missing.
Safety Check Topics	Safety Check Item response(s) is missing.
Caregiver/Household Member Assessment	Comment(s) is missing.
Caregiver Assurance	Caregiver Signature date(s) is missing.
Agency Recommendation	Agency Recommendation response(s) is missing.
<input type="button" value="Close"/>	

## Closing a Kinship Provider Record

If there are no outstanding issues with the closing process, the **Process Approval** screen appears.

2. Make the appropriate selection (based on user role) from the **Action** drop-down menu.
3. Make a selection from the **Reviewers/Approvers** drop-down menu.
4. Click **Save**.
- 5.

The **Kinship Assessment** screen appears.

**Important:** The process of Closing a Kinship Assessment will need to be repeated for each child-specific Kinship Assessment present in the record.

## Deactivating Service Credentials

1. Click **Service Credentials** in the navigation menu.

The screenshot displays the 'Kinship Assessment' screen. On the left is a navigation menu with 'Service Credentials' highlighted in a red box. The main content area shows the provider name 'Test, Provider / 121212' and category 'Home'. Below this are tabs for 'Kinship Assessment' and 'Pursuing Foster Licensure'. A 'Kinship Assessment Filter Criteria' section includes a date range for 'Kinship Assessment Start Date' (with calendar icons), a 'Child Name' dropdown, and a checked checkbox for 'Include Created in Error'. A blue 'Filter' button is present. At the bottom, a 'Kinship Assessments' section shows 'Result(s) 1 to 5 of 5 / Page 1 of 1'.

The **Service Credentials** screen appears, defaulted to the **ODJFS Approved Services** tab page.

The system should automatically end-date any Kinship Care Service Credentials when a child's placement is terminated, but in some instances, it will need to be manually deactivated.

Any active credentials will appear on the ODJFS Approved Services tab page. Users should also check the tab, **Other Services**, to view additional credentials that were added. The procedure to deactivate either is the same.

**Note:** If the deactivate link isn't visible, the following may be true:

## Closing a Kinship Provider Record

- The logged-in user may not have the appropriate security to complete the task and a user with the **Services Administrator** security user group may need to complete this.
- The Service Credential was created by a user from a different agency on a different Provider Type and cannot be deactivated.

2. Click, [deactivate](#), next to the service you wish to end-date.

ODJFS Approved Services
Other Services
Shared Home Agreements

**ODJFS Approved Services Filter Criteria**

Agency Type:

Agency:

Service Category:

Service Type:

Service Description:

Service Status:

Sort By:

Filter

**ODJFS Approved Services**

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

		Service Category	Service Type	Service Description	Service Status	Effective Date	Agency
<a href="#">view history</a>	<a href="#">deactivate</a>	Placement	Kinship Care - Non-Relative Home	Kinship Care - Non-Relative Home-Reg. Rate	ACTIVE	03/29/2022	Test County Children Services Board

The **ODJFS Approved Services Activation/Deactivation Details** grid appears (or **Other Services Activation/Deactivation Details** if you are working in the **Other Services** tab).

3. The **Effective Date** will pre-populate with the current system date, but it can be back-dated, if necessary.
4. Add any **Comments** needed.
5. Click **Save**.

**Important:** The Provider may have additional service credentials listed if they have an additional non-end-dated Provider Type (such as Foster Care, Adoption, etc.). Do not deactivate any of those credentials.

# Closing a Kinship Provider Record

**ODJFS Approved Services Activation/Deactivation Details**

Agency: Test County Children Services Board

Service Category : Placement

Service Type: Kinship Care - Non-Relative Home

Service Status: active

Service Description: Kinship Care - Non-Relative Home-Reg. Rate

Effective Date: \*

Comments:

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

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

**Note:** Users are returned to the **Service Credentials** page. Repeat this action for any remaining active Kinship Care service credentials.

PROVIDER NAME / ID: Test, Provider / 121212 CATEGORY: Home

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

**ODJFS Approved Services Filter Criteria**

Agency Type:

Agency:

Service Category:

Service Type:

Service Description:

Service Status: Active

Sort By: Service Category (Ascending)

[Filter](#)

**ODJFS Approved Services**

Service Category	Service Type	Service Description	Service Status	Effective Date	Agency
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# Closing a Kinship Provider Record

## Closing the Kinship Provider Type

1. Navigate to the **Provider Overview** screen.

**Note:** The system may have automatically end-dated the child specific Provider Type after kinship assessment closure.

2. Click, **Provider Information**.

Provider Overview

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

PROVIDER NAME / ID:  
Test, Provider / 121212

CATEGORY / STATUS:  
Home / Active

PRIMARY ADDRESS:  
123 Test Rd, Test Oh 12345

PRIMARY CONTACT:  
Cell:

Provider Actions

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

The **Manage Provider Details** screen appears.

3. To close, click **edit** next to the relevant **Provider Type/Child Name**.

Basic | Address | Members | Relationships | Caregivers | Capacity

Provider Name Information

Provider Name	Effective Date	End Date
Test, Provider	12/02/2021	

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
<a href="#">edit</a> Kinship Care - NonRelative	Test County Children Services Board	03/28/2022		<a href="#">Approved Kinship Assessment</a>

The **Provider Type Information** screen appears.

4. Enter a value in the **Type End Date**.
5. Click, **OK**.

## Closing a Kinship Provider Record

Provider Type Information

Agency: Test County Children Services Board

Provider Type: Kinship Care - NonRelative

Type Effective Date: 03/28/2022      Type End Date:

OK Cancel

The **Manage Provider Details** screen appears.

6. Repeat the steps above for each child-specific Provider Type until there are none remaining.
7. To confirm closure, click the **Include** radio button for the **Closed Type Status** in the **Provider Type Information** grid. The system will then present all Provider Types with a status of **Closed**.

Provider Name Information

Provider Name	Effective Date	End Date
Test, Provider	12/02/2021	

Provider Type Information

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

view	Provider Type/Child Name	Agency	Type Effective Date	Type End Date	Type Status
<a href="#">view</a>	Kinship Care - NonRelative.	Test County Children Services Board	08/23/2022	12/08/2022	Closed
<a href="#">view</a>	Kinship Care - NonRelative.	Test County Children Services Board	03/28/2022	11/19/2023	Closed

After all Provider Types are closed, the Provider record remains in Active status and with Workload assignments until the final step of closing the Provider Status is completed.

### Closing the Provider Status

**Note:** The following is a **supervisory function**:

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

# Closing a Kinship Provider Record

Basic | Address | Members | Relationships | Caregivers | Capacity

**Provider Name Information**

Provider Name	Effective Date	End Date
Test, Provider	12/02/2021	

**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
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**Provider Status Information**

[View Status History](#)

Provider Status	Reason	Status Effective Date
<a href="#">view</a> Active <a href="#">edit</a>		12/02/2021

Provider Status:

The **Provider** Tab page appears.

3. Enter an **Effective Date**.
4. Enter **Comments** if necessary.
5. Click, **OK**.

**Provider Status Information**

Provider Status: \*

Effective Date: \*

Comments:

1000

The **Manage Provider Details** screen appears.

## Closing a Kinship Provider Record

6. Click, **Save**.

**Provider Status Information**

[View Status History](#)

	Provider Status	Reason	Status Effective Date
<a href="#">view</a> <a href="#">edit</a>	Closed		12/02/2021

Provider Status:

**Provider Reference Information**

Reference Type	Reference Number	Description
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The Provider Record is now Closed, and any assignments are automatically end-dated.

If you need additional information or assistance, please contact the OFC Automated Systems Help Desk at [sacwis\\_help\\_desk@childrenandyouth.ohio.gov](mailto:sacwis_help_desk@childrenandyouth.ohio.gov).