Ohio | Department of Job and Family Services

Provider Management

This packet contains the exercises listed below. Complete them at your own pace. If you need help, remember to use your User Guide, WBT, online help, or online policies. Ask the trainer for assistance if you can't find the answer to your questions in these sources.

What you'll do

Important: These exercises may not reflect the process flow at your county or office. They use contrived data for training purposes. Still, you can apply what you learn in class to the processes at your office.

Also: Reports cannot be generated in the training region. To become familiar with location and steps for accessing; please follow steps for accessing reports presented in the exercises. When the hour glass appears, click on "cancel".

SG 1.6 Revised for Build 1.93.1

Exercise PRM-1. Record a Recruitment Plan and an Event

Scenario

Create and approve a recruitment plan for Franklin County Children Services, record the plan for a future event, and then record the results of the planned recruiting event.

Tasks

Task 1. Create a recruitment plan

Task 2. Record a planned recruitment event

Task 3. Record the results of the planned event

Task 1. Create a recruitment plan

By using the copy function, you can use an existing recruitment plan as the basis for a new one and thus save yourself a lot of repetitive data entry. In this exercise, create a foster care recruitment plan for the 2007 fiscal year by copying and editing the 2006 plan.

1. From the Home screen, click the **Provider** tab.
2. Click the **Recruitment** tab.

3. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Plan Type	Foster Home	
From Effective Date	07/01/2005	
To Effective Date	06/30/2006	

4. Click **Filter**.

5. Find your copy of the Franklin County Children Services Recruitment Plan in the search results, and click the **copy** link beside it. The Recruitment Plan Information screen appears. The system opens a new plan and copies the information from the existing plan you selected.

6. In the Recruitment Plan Information area, complete the following fields:

Field Name	Information to Enter/Select	Notes
Plan Name	Franklin Co. CSB Recruitment Plan for 2007 (##)	
Effective Date	07/01/2006	
Expiration Date	06/30/2007	
# of Projected Inquiries	40	
# of Planned Recruitment Events	5	
# of Children to be Placed	20	
# of Families to be Approved/Certified	5	

7. Click **Apply** to save your work.
8. Click **Process Approval** to send the plan to the State for approval.

9. In the **Action** field, select Approved and Routed. In the **Reviewer/Approvers** field select Weaver## Sam. (After approving the plan, the approver would then route the recruitment plan to ODJFS by selecting 'Ohio Department of Job and Family Services' from the Agency selection list and selecting the Approver from the Reviewers/Approver selection list.)

10. Click **Save**. The system submits the plan to the State for approval and returns to the Recruitment Plan Information screen.

11. Click **Close**.

Result The system returns to the Recruitment Plan list screen.

Task 2. Record a planned recruitment event

Your agency has had a booth at the county fair for several years. The fair has provided a good recruiting opportunity, so you want to have a booth at the fair this year too. Record this planned event.

1. Click the **Events** tab. If the Agency field is highlighted, click off to the side of the field.

2. Click **Add Event**. The **Event Information** tab appears.

3. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Recruiter	Recruiter 1	
Event Type	County Fair	
Event Name	FCCSB Fair Booth 2006##	
Begin Date	09/17/2006	
End Date	09/23/2006	
Event Goal/Objective	Recruit more foster parents within the county.	
Event Description	Booth at fairgrounds. Brochures and a sign-up sheet for prospective volunteers will be provided.	
Event Sponsors	Unknown private donation will be used.	
What prompted the Agency involvement in the Event?	Success of booth at past fairs.	
Materials/Equipment Needed	Folding table, 8 chairs, brochures, clip board with signup forms, pens	

4. In the Event Address area, complete the following fields:

Field Name	Information to Enter/Select	Notes
Event Location	Franklin County Fairgrounds	
Street Number	4100	
Street Name	Columbia Street	
City	Columbus	
County	Franklin	
State	Ohio	
Zip	43026	
Point of Contact Name	Shanti Lewis	
Point of Contact Phone	614-363-9400	

5. In the Event Target Area, type *43211* in the **Zip Code** field. Click **Add>>** to save your selection and add it to the **Selected Zip Codes** field.

6. In the Projections area, complete the following fields:

Field Name	**Information to Enter/Select**	**Notes**
Number of Participants [excluding staff]	100	
Number of Inquiries	25	
Costs [excluding staff]	350.00	
Staff Hours	80	

7. Click **Save**.

Result The system saves your work and returns to the **Events** tab.

Task 3. Record the results of the planned event
After a recruitment event, you record general information about the outcomes as well as a list of the people who requested information (who in Ohio SACWIS are called “participants”). Record the results of the recruiting activities at the county fair.

1. On the **Events** tab, if the Agency field is highlighted, click off to the side of the field. Find the event FCCSB Fair Booth 2006## in the Recruitment Events list.

2. Click the **edit** link for that event. The **Event Information** tab appears.

3. Click the **Event Outcome** tab.

4. In the Event Outcome Details area, complete the following fields:

Field Name	Information to Enter/Select	Notes
Was the Event Held?	Yes	
Was the Event Successful?	Yes	
Describe the success/ failure of the Event...	Event attracted more interest than projected.	

5. In the Actuals area, complete the following fields:

Field Name	Information to Enter/Select	Notes
Number of Participants [excluding staff]	150	
Number of Inquiries	30	
Costs [excluding staff]	350.00	
Staff Hours	80	

6. In the Participant area, click **Add Participant.** The Event Participant Details screen appears.

For a real event, you would add information for each person who requested information about becoming a foster parent. For this exercise, you’ll just enter information about one participant: a man named Alvin Franklin.

7. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Name	Alvin Franklin	
Gender	Male	
DOB	09/01/1956	
Race	Black/African American	
Ethnicity	African American/Black	
Street Number	1344	
Street Name	Winchester St.	
City	Columbus	
State	Ohio	
Zip Code	43211	
Home Phone	614-755-6465	
Participant Type	Resource	
Additional Information	Mr. Franklin and his wife have been foster parents before (in West Virginia).	

8. Click **OK**. The system returns to the **Event Outcome** tab, where Alvin has been added to the Participant Records table.

9. Click **Save**.

Result The system saves your work and returns to the Recruitment Event list screen. You have completed this exercise.

Exercise PRM-2. Track a Foster Home Application

Scenario

This scenario begins when you receive an inquiry from Jack and Susan Smith, a couple who wish to become foster parents. Record the receipt of their inquiry, adding records for Jack and Susan to the system. Give them an application and record its progress after they return it. At the end of the exercise, screen in the application and create a provider case.

Tasks

Task 1. Add the inquiry
Task 2. Add a person record for Susan Smith
Task 3. Enter demographic information
Task 4. Add an address and contact information
Task 5. Record Susan's level of education
Task 6. Record background information
Task 7. Record information about employment and income
Task 8. Complete the entry for Susan
Task 9. Add a person record for Jack Smith
Task 10. Enter demographic information
Task 11. Add Jack's address and contact information
Task 12. Record Jack's level of education
Task 13. Record background information
Task 14. Record information about employment and income
Task 15. Complete the entry for Jack
Task 16. Give an application to the Smiths
Task 17. Record the receipt of the application
Task 18. Update the inquiry
Task 19. Screen in the application
Task 20. Create a provider case

Task 1. Add the inquiry
Jack and Susan recently visited a recruiting booth at the county fair and requested information about becoming foster parents. Open an inquiry in the system.

1. Click the **Inquiry** tab. The system displays the Inquiry Search screen.

2. Complete the following fields, then click **Search**:

Field Name	Information to Enter/Select	Notes
Last Name	Smith##	
First Name	Susan	

3. There is no existing inquiry for Susan, so click **Add Inquiry.** The system displays the inquiry tabs.

4. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Inquiry Received By	Weaver, Sam	
Inquiry Type	Foster Care	
Inquiry Date	12/12/2005	

5. Click **Add Member** (every inquiry must have at least one member). The Person Search screen appears.

6. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Last Name	Smith##	
First Name	Susan	

7. Click **Search**.

Result The system does not find any Smiths, so we will add them now.

Note It's critically important not to create two or more records for the same person. Always search for an existing person record before you create one.

Task 2. Add a person record for Susan Smith
Since the system does not contain a person record for Susan, you must create one. You'll create a record in this task and add a variety of information in subsequent tasks.

1. Click **Add Person**. The Person Information screen appears.

2. Complete the following fields:

Field Name	**Information to Enter/Select**	**Notes**
Gender	Female	
SSN	987-##-6543	Click radio button for Add/Edit beside SSN first
DOB	08/28/1962	
Driver's License #	DR 3879##	
Issue State	Ohio	
Expiration	08/28/2014	

3. Click **Apply**.

Result The system saves your work without leaving the Person Information screen. You have created a person record for Susan.

Task 3. Enter demographic information

Add information about Susan's race, ethnicity, language, and marital status.

1. Click the **Demographics** tab.

2. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Race	White	
Hispanic/Latino	No	
Ancestry	Caucasian	
Language	English	

3. Click **Add Marital Status**. The Marriage/Relationship History Details screen appears.

4. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Marriage/Relationship Status	Married	
Spouse/Significant Other Name	Jack Smith	
Status Effective Date	08/01/1983	

5. Click **Save**.

Result The system saves your work and returns to the **Demographics** tab.

Task 4. Add an address and contact information

Just as you search for existing person records before you add a new one, you also must search for an address before you create a new entry.

1. Click the **Address** tab.

2. Click **Add Address**. The Domestic Address Details screen appears.

3. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Street Number	25##	
Street Name	E. Broad St	
City	Columbus	
Address Type	Residence	
Effective Date	08/01/1983	

4. Click **Search**. The system finds the address and displays it in the search results.

5. Click the **select** link beside the address in the search results. The system returns to the **Address** tab and displays the address in the Person Address area.

6. Click **Apply**.

7. Click **Add Phone/Email**. The Phone/Email Details screen appears.

8. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Type	Home	
Primary	Select this check box.	
Phone/Email	614-444-4490	

9. Click **Save**.

Result The system saves your work and returns to the **Address** tab.

Task 5. Record Susan's level of education

Susan attended college but did not graduate. Record this on the **Add'l** tab.

1. Click the **Add'l** tab.
2. In the **Highest Level of Education** field, select Attended College.
3. Click the check box next to **Ohio Resident**.
4. Click **Apply**.

Result The system saves your work without leaving the **Add'l** tab.

Task 6. Record background information

Susan does not have a criminal history. Record this on the **Background** tab.

1. Click the **Background** tab.
2. In the field **Does the Person have a Criminal History**, select No.
3. Click **Apply**.

Result The system saves your work without leaving the **Background** tab.

Task 7. Record information about employment and income

Susan is a waitress who makes $35,000/year. Record her employment and income.

1. Click the **Employment** link (above the tabs). The **Employment History** tab appears.

2. Click **Add Employment**. The Employment Details screen appears.

3. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Begin Date	06/05/1982	
Employer	Dancing Donkey Restaurant	

4. Click **Save**. The system saves your work and returns to the **Employment History** tab.

5. Click the **Income** tab.

6. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Select Employer	Dancing Donkey Restaurant	
Type	Earned - Wages or Salary	

7. Click **Add Income**. The Income Record screen appears.

8. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Effective Month/Year	06/1982	
Wage/Amount	35,000	
Frequency	Annually	
Hours Worked	40	

9. Click **Save**.

Result The system saves your work and returns to the **Income** tab. You've finished entering information for Susan's person record.

Task 8. Complete the entry for Susan

Return to the inquiry screens and define Susan’s role in the inquiry.

1. Click **Close** to return to the inquiry. You are on the Members tab.

2. Click **Add Member**.

3. Search for and select Smith##, Susan. You are returned to the Members tab, and Susan now appears in the Member List.

4. In the **Role** field beside Susan, select Inquirer 1.

5. Click **Apply**.

Result The system saves your work without leaving the **Members** tab of the inquiry.

Task 9. Add a person record for Jack Smith
Add Jack to the inquiry and create a person record for him.

1. Click **Add Member**. The Person Search screen appears.

2. Complete the following fields, then click **Search**:

Field Name	Information to Enter/Select	Notes
Last Name	Smith##	
First Name	Jack	

3. There is no existing person record for Jack, so click **Add Person.**
The system displays the Person Information screen.

4. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Gender	Male	
SSN	201-##-5786	Click radio button for Add/Edit beside SSN first
DOB	12/04/1960	
Driver's License #	RR 9197##	
Issue State	Ohio	
Expiration	12/04/2014	

5. Click **Apply**.

Result The system saves your work without leaving the Person Information screen. You have created a person record for Jack.

Task 10. Enter demographic information
Add information about Jack's race, ethnicity, language, and marital status.

1. Click the **Demographics** tab.

2. Complete the following fields:

Field Name	**Information to Enter/Select**	**Notes**
Race	White	
Hispanic/Latino	No	
Ancestry	German	
Language	English	

3. Click **Add Marital Status**. The Marriage/Relationship History Details screen appears.

4. Complete the following fields:

Field Name	**Information to Enter/Select**	**Notes**
Marriage/Relationship Status	Married	
Spouse/Significant Other Name	Susan Smith	
Status Effective Date	08/01/1983	

5. Click **Save**.

Result The system saves your work and returns to the **Demographics** tab.

Task 11. Add Jack's address and contact information

You know that Jack's address is already in Ohio SACWIS. Find the address and add it to Jack's person record along with his home phone number.

1. Click the **Address** tab.

2. Click **Add Address**. The Domestic Address Details screen appears.

3. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Street Number	25##	
Street Name	E. Broad St.	
City	Columbus	
Address Type	Residence	
Effective Date	08/01/1983	

4. Click **Search**. The system finds the address and displays it in the search results.

5. Click the **select** link beside the address in the search results. The system returns to the **Address** tab and displays the address in the Person Address area.

6. Click **Apply**.

7. Click **Add Phone/Email**. The Phone/Email Details screen appears.

8. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Type	Home	
Primary	Select this check box.	
Phone/Email	614-444-4490	

9. Click **Save**.

Result The system saves your work and returns to the **Address** tab.

Task 12. Record Jack's level of education
Jack graduated from college with a Bachelor's degree.

1. Click the **Add'l** tab.

2. In the **Highest Level of Education** field, select Bachelor Degree.

3. Click the check box next to **Ohio Resident**.

4. Click **Apply**.

Result The system saves your work without leaving the **Add'l** tab.

Task 13. Record background information
Jack does not have a criminal record.

1. Click the **Background** tab.

2. In the field **Does the Person have a Criminal History**, select No.

3. Click **Apply**.

Result The system saves your work without leaving the **Background** tab.

Task 14. Record information about employment and income
Jack works for Kroger's, where he earns $40,000/year.

1. Click the **Employment** link (above the tabs). The **Employment History** tab appears.

2. Click **Add Employment**. The Employment Details screen appears.

3. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Begin Date	09/15/1985	
Employer	Kroger's	

4. Click **Save**. The system saves your work and returns to the **Employment History** tab.

5. Click the **Income** tab.

6. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Select Employer	Kroger's	
Type	Earned - Wages or Salary	

7. Click **Add Income**. The Income Record screen appears.

8. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Effective Month/Year	09/1985	
Wage/Amount	40,000	
Frequency	Annually	
Hours Worked	40	

9. Click **Save**.

Result The system saves your work and returns to the **Income** tab. You've finished entering information for Jack's person record.

Task 15. Complete the entry for Jack
Return to the inquiry screens and define Jack's role in the inquiry.

1. Click **Close** to return to the inquiry. You are now on the Members tab of the Inquiry Search screen.

2. Click **Add Member**.

3. Search for and select Smith##, Jack. You are returned to the Members tab, and Jack now appears in the Member List.

4. In the **Role** field for Jack, select Inquirer 2.

5. Click **Apply**.

Result The system saves your work without leaving the **Members** tab. You've created an inquiry record for the Smiths. The system generates a tickler to remind you to give the them an application within 7 days.

Task 16. Give an application to the Smiths
The Smiths visit your office and get an application for child placement. Record this action in the activity log.

1. Click the **Activity/Decision** tab.

2. In the Activity Log area, click **Add Activity**. The Activity Information screen appears.

3. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Activity Type	Application Provided	
Date of Activity	12/15/2005	
Comments	The Smiths came to my office and I gave the packet to them and talked for a while. I agreed to come to their house, go over some paperwork with them, and get the process started.	

4. Click **OK**. The system returns to the **Activity/Decision** tab.

5. Click **Apply**.

Result The system saves your log entry without leaving the **Activity/Decision** tab.

Task 17. Record the receipt of the application

The next day you visit the Smiths and they give you their application. Update the activity log to show receipt of the application. If you're not still on the **Activity/Decision** tab, go back to it.

1. Click **Add Activity**. The Activity Information screen appears.

2. Complete the following fields and click **OK**:

Field Name	Information to Enter/Select	Notes
Activity Type	Application Received	
Date of Activity	12/16/2005	

3. Click **Apply**.

Result The system saves your log entry without leaving the **Activity/Decision** tab.

Note You will record the home visit in a little while when you create the provider case.

Task 18. Update the inquiry

Enter information from the Smith's application on the **Referral Sources** and **Optional Info** tabs.

1. Click the **Referral Sources** tab.

2. In the **Available Referral Sources** field, select Recruitment Event. Click **Add>** to move your selection to the **Selected Referral Sources** field.

3. Click the **Optional Info** tab.

4. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Minimum Age	0	
Sibling Group	Yes	
Gender	Either	
Maximum Age	10	
Minor Mother	No	
Accept More Than 1 Child	Yes	
Race	No Preference/All	
# of Bedrooms	3	
Marital Status	Married two parent household with two biological/adoptive parents	
Transportation Available	Yes	

5. Click **Apply**.

Result The system saves your work without leaving the **Optional Info** tab.

Task 19. Screen in the application

Use the **Activity/Decision** tab to screen in the Smith's application.

1. Click the **Activity/Decision** tab.

2. In the **Decision** field, select Screen In - Application Received.

3. Click **Save**.

Result The system saves your work and returns to the Inquiry Search screen. The inquiry record is now classified as a completed inquiry. It will be displayed on the **Completed Inquiries** tab and cannot be deleted from Ohio SACWIS.

Task 20. Create a provider case

Creating a provider case is the basis for subsequent work with the Smiths. Information from the inquiry carries over when you create the provider case.

1. Click the **Completed Inquiries** tab.

2. Find the row for Susan Smith and click **link** in that row. The Link Provider Information screen appears.

3. Click **Add New Provider**. The Provider Name Information screen appears.

4. Click the **Address** tab.

5. Click **Add Contact**. The Contact Information screen appears.

6. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Type	Home	
Primary	Select this check box.	
Phone/Email	614-363-1234	

7. Click **OK**. The system returns to the **Address** tab.

8. Click **Save**.

Result The system saves your work and displays the Provider Overview screen. You have created a provider case for Jack and Susan Smith. You have completed this exercise.

Exercise PRM-3. Record Training for Providers

Scenario

On December 5, 2005, Jack and Susan Smith attended a training session called Introduction to Foster Parenting. Record this training in their provider record. Then add Jack and Susan to two upcoming training sessions.

Tasks

Task 1. Add a session for Introduction to Foster Parenting

Task 2. Add Jack and Susan as participants

Task 3. Set the session's status to "Completed"

Task 4. Enroll the Smiths in upcoming training sessions

Task 1. Add a session for Introduction to Foster Parenting
Describe the class, the competencies it addresses, and other relevant information. You should be on the Provider tab.

1. Click the **Training** tab.

2. In the **From Session Date** field, type *12/01/2005*.

3. In the **Session Name** field, type *Introduction to Foster Parenting##*.

4. Click **Search**. The system does not find Introduction to Foster Parenting.

5. Click **Add Session**. The Training Session Information screen appears.

6. Complete the following fields:

Field Name	**Information to Enter/Select**	**Notes**
Session Name	Introduction to Foster Parenting##	
Instructor Name	Anita Raines	
Session Date	12/15/2005	
Delivery Method	Classroom	
Session Start Time	08:00 AM	
Session End Time	05:00 PM	
Actual Hours	8	
Maximum Participants	20	

7. Select the following training competencies:

- Agency Policies
- Effects of placement and separation
- Working with families

Click **Add>** to move your selections to the **Selected Types** field.

8. In the **Status** field, select Draft.

9. Click **Apply**.

Result The system saves your work without leaving the Training Session Information screen.

Task 2. Add Jack and Susan as participants
Enter information about Jack and Susan's participation in a training session.

1. Click the **Participants** tab.

2. Click **Add Participant.** The Person Search screen appears.

3. Search for Jack Smith##, and select his record in the search results. The system returns to the **Participants** tab.

4. Repeat steps 2 and 3 to select Susan Smith## and return to the **Participants** tab.

5. Complete the following fields for *both* Jack and Susan:

Field Name	Information to Enter/Select	Notes
Training Type	Pre-Placement	
Level of Care	Family Foster Home	
Apply Hours to Certification	Yes	

6. Click **Apply**.

Result The system saves your work without leaving the **Participants** tab.

Task 3. Set the session's status to "Completed"
Go back to the **Session Information** tab and change the status to "Completed."

1. Click the **Session Information** tab.

2. In the **Status** field, select "Completed."

3. Click **Save**.

Result The system saves your work and returns to the Training Session Search screen.

Task 4. Enroll the Smiths in upcoming training sessions
Enroll Jack and Susan in two classes:
• Disease Prevention • Creative Parenting and Discipline

1. Complete the following fields on the Training Session Search screen:

Field Name	Information to Enter/Select	Notes
From Session Date	01/01/2006	
To Session Date	02/01/2006	
Session Name	Disease Prevention##	

2. Click **Search**.

3. Find Disease Prevention in the search results and click its **edit** link. The **Session Information** tab appears.

4. Click the **Participants** tab.
5. Click **Add Participants**. The Person Search screen appears.

6. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Last Name	Smith##	
First Name	Susan	

7. Click **Search**.
8. Select Susan in the search results. The system returns to the **Participants** tab.

9. Complete the following fields for Susan:

Field Name	Information to Enter/Select	Notes
Training Type	Pre-Placement	
Level of Care	Family Foster Home	
Apply Hours to Certification	Yes	

10. Repeat steps 5 through 9 for Jack Smith, using the same information given above.
11. Click **Apply** to save your work.

12. Click the **Session Information** tab.
13. In the **Status** field, select Completed.
14. Click **Save**. The system saves your work and returns to the Training Session Search screen.

15. Repeat this procedure, using the information above, to enroll Jack and Susan in the second class, Creative Parenting and Discipline.

Result You should be on the Training Session Search screen when you finish. You have completed this exercise.

Exercise PRM-4. Record a Home Study

Scenario

In this exercise, you'll play the role of Sam Weaver, the home study assessor. You'll use the provider directory to find Jack and Susan Smith, and you'll record their home study.

Tasks

Task 1. Display the Smith's provider case
Task 2. Add a home study
Task 3. Complete verifications
Task 4. Record the safety audit
Task 5. Record references
Task 6. Describe sleeping arrangements in the home
Task 7. Describe living conditions
Task 8. Describe the neighborhood
Task 9. Record information about schools
Task 10. Describe available transportation
Task 11. Describe the applicants
Task 12. Describe the family
Task 13. Link assessment visits
Task 14. Record training the applicants have completed
Task 15. Identify child characteristics the applicants are willing to accept
Task 16. Record placement criteria
Task 17. Record the disposition and submit the home study for approval
Task 18. Record completion of the home study in the activity log
Task 19. Approve the home study
Task 20. Submit a certification request for approval

Task 1. Display the Smith's provider case
Use the provider directory to navigate to the provider case for Jack and Susan Smith.

1. Click the **Directory** tab.

2. Type *Smith%* in the **Provider Name** field.

3. Click **Search**.

4. Find Jack and Susan in the search results and click the **edit** link in their row.

Result The system displays the Provider Overview screen for the Smiths.

Note In a search, the percent character (%) can substitute for one or more other characters. A search for "Smith%" will find Smith and any name that begins with Smith (Smithson, Smithers, and so on).

Task 2. Add a home study
Complete the Home Study Details screen to begin the initial home study.

1. In the menu on the left, click the **Home Study** link. The Maintain Home Study History screen appears.

2. Click **Add Initial Home Study**. The Home Study Details screen appears.

3. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Assessor	Sam Weaver	
Provider Type	Foster Care	
Level of Care	Family Foster Home	
Start Date	12/16/2005	

4. Click **Save**.

Result The system saves your work and displays the Maintain Home Study Information screen.

Task 3. Complete verifications
The Maintain Home Study Information screen presents links to all sections of the home study. Begin by completing the Verifications section.

1. Click the **Verifications** link. The Maintain Verification Tasks screen appears.
2. Click the **edit** link for the first task. The Verification Details screen appears.

3. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Status	Verified	
Date	12/23/2005	

4. Click **Save**. The system saves your work and returns to the Maintain Verification Tasks screen.

5. Repeat steps 2 through 4 for all of the other verification tasks, using the information below. You must enter a response to every topic, or you will not be able to submit the home study for approval.

Verification Task	Status	Date
Well Water Test Completed	Approved	12/23/2005
Has Applicant 1 been an Ohio resident for the last five years?	Verified	12/23/2005
Date of Initial Social Worker/Assessor Contact	Verified	12/23/2005
Safety Audit Completed	Approved	12/23/2005
Verified Marriage	Verified	12/23/2005
Medical Forms	Verified	12/23/2005
Fire Inspection Completed	Approved	12/23/2005
Applicant Completed Pre-Service Training	Verified	02/15/2006
Verified Driver's License	Verified	12/23/2005
Child Characteristics	Verified	12/23/2005
Alternate Water Plan Submitted/Approved	Approved	12/23/2005
Financial Statement	Verified	12/23/2005
Criminal Record Check	Verified	02/15/2006
Has Applicant 2 been an Ohio resident for the last five years?	Verified	12/23/2005
Verified Divorce(s)	Verified	12/23/2005
FBI Check	Verified	02/15/2006
Applicant Attended Information/Orientation Meeting	Verified	12/17/2005
Date Application received by Agency	Verified	12/16/2005

Note The sequence of verification tasks changes as the tasks are completed.

6. Click **Close**.

Result The system returns to the Home Study Topics screen, which now shows that the status of Verifications is "Completed."

Task 4. Record the safety audit
Safety factors for the home are evaluated on the **Safety Audit** tabs. The Smith's home meets all criteria.

1. Click the **Safety Audit** link. The Maintain Safety Audit I Details screen appears.

2. Enter Yes in the **Status** field for all the Safety Audit Rules on the following tabs:

- **Safety Audit I**
- **Safety Audit II**
- **Safety Audit III**

3. Click **Apply** to save your work.

4. Click the **Disposition** tab.

5. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Home Meets the Safety Audit Standards	Yes	
Date Safety Audit was Conducted	12/23/2005	

6. Click **Save**.

Result The system returns to the Maintain Home Study Information screen.

Task 5. Record references
Enter the three references that are required for the Smiths.

1. Click **References**. The Maintain References screen appears.

2. Click **Add Reference**. The Reference Details screen appears.

3. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Reference Name	Make up a name.	
Date Received	12/23/2005	
Location	Make up an address.	

4. Click **Save**. The system returns to the Reference Details screen.

5. Repeat steps 2 through 4 to add two more references.

6. When you've finished, click **Close**.

Result The system returns to the Maintain Home Study Information screen.

Task 6. Describe sleeping arrangements in the home
Record the number of bedrooms in the home and describe the family's current sleeping arrangements.

1. Click **Description of Home.** The Description of Home Information screen appears.

2. Click **Maintain Description of Home**. The Description of Home History screen appears.

3. Click **Add Description of Home**. The Maintain Home Information screen appears.

4. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Effective Date	Today's date	
Number of Bedrooms	3	

Next, you will enter a separate description for each bedroom.

5. In the field **Approved Fire Inspected Floors for Sleeping Arrangements**, select Second.

6. Click **Add Sleeping Arrangement**. The Sleeping Arrangement Details screen appears.

7. Complete the following fields for the first bedroom:

Field Name	Information to Enter/Select	Notes
Bedroom Number	1	
Floor/Level	Second	
Bed Type	King	
Will the Foster/Adoptive Child Use this Bed?	No	

8. In the area House Members Sharing a Bed, select Jack and Susan.

9. Click **OK**. The system returns to the Maintain Home Information screen.

10. Repeat steps 5 through 7 to add descriptions for the other bedrooms, using the following information:

Field Name	Bedroom 2	Bedroom 3
Bedroom Number	2	3
Floor/Level	Second	Second
Bed Type	Twin	Twin
Will the Foster/Adoptive Child Use this Bed?	Yes	Yes

11. Click **OK**.

12. Click **Apply**.

Result The system returns to the Maintain Home Information screen.

Task 7. Describe living conditions
Briefly describe the environment inside the home.

1. Click the **Living Conditions** tab.

2. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Briefly describe the livable conditions and general atmosphere…	Enter a brief, positive description.	
Is Smoking Allowed in the House?	No	
Does Any Family Member Smoke?	No	
Are there Pets in the Home?	No	
Does the Applicant Operate a Business from the Home?	No	

3. Click **Apply**.

Result The system saves your work without leaving the **Living Conditions** tab.

Task 8. Describe the neighborhood
Briefly describe the environment outside the home.

1. Click the **Outdoor/Neighborhood** tab.

2. In the Outdoor Home Amenities area, select the following:

- **Attached Garage**
- **Play Equipment**
- **Fenced and Locked Gate**
- **Fenced Yard**
- **Porch**

3. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Describe Safety Issues of Areas Around the Outside of the Home	None	
Describe the Neighborhood in which the Home is Located	Enter a brief, positive description.	

4. Click **Apply**.

Result The system saves your work without leaving the **Outdoor/Neighborhood** tab.

Task 9. Record information about schools

Record the names and locations of the schools the child(ren) would attend.

1. Click the **School Info** tab.

2. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Elementary School	Richmond Elementary	
Location	3 blocks from house	
Middle/Jr. High School	Columbus Jr. High	
Location	1 mile away	
High School	Montgomery High School	
Location	2 miles away	
Does the Applicant Plan to Home School?	No	

3. Click **Apply**.

Result The system saves your work without leaving the **School Info** tab.

Task 10. Describe available transportation

On the **Transportation** tab, enter information about public and/or privately owned transportation available to the family.

1. Click the **Transportation** tab.

2. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Number of Cars	*2*	
Are Vehicles in Running Condition?	Yes	
Does the Applicant have Proof of Insurance for All Operational Vehicles?	Yes	
List Insurance Company Names and Identify Operational Vehicles that are Uninsured	StateWide Insurance	All vehicles are insured.
Is the Home on a City Bus Line Route?	No	

3. Click **Save**. The system saves your work and returns to the Description of Home History screen.

4. Click **Close**. The system returns to the Description of Home Information screen.
5. Click **Close**.

Result The system returns to the Maintain Home Study Information screen.

Task 11. Describe the applicants
The Maintain Applicant Narratives screen captures information about motivation, appearance, values, and other personal characteristics. Describe both Jack and Susan.

1. Click the **Description of Family** link. The Description of Family Information screen appears.

2. Click **Maintain Description of Family**. The Maintain Description of Family screen appears.

3. Click **Add Family Description**. The Description of Family Details screen appears.

4. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Narrative Type	Initial	
Effective Date	Today's date	

5. Click **Save**. The system returns to the Maintain Description of Family screen.

6. Click the **edit** link in the table. The system returns to the Description of Family Details screen, which now displays links to narrative screens.

7. Click **Applicant Narratives**. The Maintain Applicant Narratives screen appears.

8. Under the first topic, Describe Applicant's Attitudes and Beliefs Regarding Foster Care/Adoption Issues, click the **edit** link for Jack. The Narrative Details screen appears.

9. Enter a brief, positive description.

10. Click **Save**. The system saves your entry and returns to the Maintain Applicant Narratives screen.

11. Under the first topic, click the **edit** link for Susan. The Narrative Details screen appears.

12. Enter a brief, positive description.

13. Click **Save**. The system saves your entry and returns to the Maintain Applicant Narratives screen.

14. Repeat steps 8 through 13 for the remaining topics. You must enter a response to every topic, or you will not be able to submit the home study for approval.

15. Click **Close**.

Result The system returns to the Description of Family Details screen.

Task 12. Describe the family
Describe Jack and Susan’s relationship.

1. Click the **Family Narratives** link. The Maintain Family Narratives screen appears.

2. Click the **edit** link for the first topic, Relationship Between Applicant 1 and Applicant 2. The Narrative Details screen appears.

3. In the **Narrative** field, write a brief, positive description of the relationship between Jack and Susan.

4. Click **Save**. The system saves your entry and returns to the Maintain Family Narratives screen.

5. Repeat steps 2 through 4 to respond to the remaining topics. You must enter a response to every topic, or you will not be able to submit the home study for approval.

6. When you’ve finished, click **Close**. The system returns to the Description of Family Details screen.

7. Click **Save**. The system returns to the Maintain Description of Family screen.

8. Click **Close**. The system returns to the Description of Family Information screen.

9. Click **Close**.

Result The system returns to the Maintain Home Study Information screen.

Note You don’t have to complete the member narratives because there are no other family members living in Jack and Susan’s home.

Task 13. Link assessment visits
Record the previous assessment visits in the activity log and link the visits to the home study.

1. Click the **Assessment Visits** link. The Maintain Linked Assessment Visits screen appears.

2. Click **Link Visits**. The Activity Log list screen appears.

3. Click **Add Activity Log**. The Activity Log Details screen appears.

4. Complete the following fields to record the visit on December 16:

Field Name	Information to Enter/Select	Notes
Responsible Worker	Weaver, Sam	
Activity Start Date	12/16/2005	
Start Time	9:00 AM	
Contact Type	Announced Home Visit	
Category	Foster Home Applicant	
Sub-Category	Assessment Visit	
Location Type	Placement Setting	
Narrative	Caseworker met with Mr. and Mrs. Smith to explain the Home Study Process.	
Activity State	Completed	

5. Click **Save**. The system returns to the Activity Log list screen.

6. Click **Add Activity Log** again.

7. Complete the following fields to record the visit on December 23:

Field Name	Information to Enter/Select	Notes
Responsible Worker	Weaver, Sam	
Activity Start Date	2/23/2005	
Start Time	9:00 AM	
Contact Type	Announced Home Visit	
Category	Foster Home Applicant	
Sub-Category	Assessment Visit	
Location Type	Placement Setting	
Narrative	Mrs. Smith answered questions for the completion of the home study and took caseworker on a tour of the home.	
Activity State	Completed	

8. Click **Save**. The system returns to the Activity Log list screen.

9. Select activity records to link to the home study by clicking the check box beside the appropriate records in the Activity Log grid.

10. Click **Link Visits**. The Maintain Linked Assessment Visits screen appears.

11. Click **Save**.

Result The system saves your work and returns to the Maintain Home Study Information screen.

Task 14. Record training the applicants have completed
Link the applicants' pre-placement training to the home study.

1. Click **Training Completed**. The Completed Training list screen appears.

2. Click **Link Training**. The Training Record List screen appears.

3. Click the **select** link for Jack. The Training Summary screen appears.

4. Select every pre-placement training displayed in the Completed Training List.

5. Click **OK**. The system returns to the Completed Training list screen and displays the classes you just linked to Jack.

6. Repeat steps 2 through 5 for Susan.

7. On the Completed Training list screen, select **All Training Requirements have been Successfully Completed**.

8. Click **Save**.

Result The system saves your work and returns to the Maintain Home Study Information screen.

Task 15. Identify child characteristics the applicants are willing to accept
Use the Characteristics screen to create a profile of the characteristics Jack and Susan will and will not accept in foster children.

1. Click **Acceptance Criteria Information**. The Acceptance Criteria Information screen appears.

2. Click **Maintain Acceptance Criteria**. The Acceptance Characteristics list screen appears.

3. Click **Add Characteristics**. The Characteristics screen appears. This screen lists all available characteristics by default, so the list is very long.

4. In the **Provider Type** field, select Foster Care.

5. In the **Select Group** field, select Dental Problems.

6. Click **Show**. The system filters the list to display only dental characteristics.

7. In the **Select All** field (top cell of the right-hand row), select Willing. The system selects Willing to Consider for every item in the list.

8. Click **Apply** to save your work.

9. In the **Select Group** field, select Other Medical Conditions. Click **Show** to display only characteristics related to medical conditions.

10. In the **Select All** field (top cell of the right-hand row), select Willing. The system selects Willing to Consider for every item in the list.

11. Click **Apply** to save your work.

12. Repeat steps 9 through 11 for every group in the **Select Group** field. Select Willing to Consider for each group. You *must* enter a response to every topic, or you will not be able to submit the home study for approval.

13. When you've finished, click **Save.**

Result The system saves your work and returns to the Acceptance Characteristics list screen.

Note The **Select All** field is a very valuable tool for working with the list of characteristics. To use this field, however, you must filter the list first. You cannot use this field with the entire list at once.

Task 16. Record placement criteria
Use the Usage Placement Criteria Details screen to define the gender, number, and ages of children that can be placed with this provider.

1. Click the **Usage Placement Criteria** tab.

2. Click **Add Criteria**. The Criteria screen appears.

3. In the **Provider Type** field, select Foster Care.

4. Click **Add**. The Usage Placement Criteria Details screen appears.

5. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Gender	Female	
Number of Children	2	
Minimum Age	0, 01	Give age as years, months.
Maximum Age	09, 11	

6. Click **OK**. The system returns to the Criteria screen.

7. Click **Save**. The system saves your work and returns to the **Usage Placement Criteria** tab.

8. Click **Close**. The system returns to the Acceptance Criteria Information screen.

9. Click **Close**.

Result The system returns to the Maintain Home Study Information screen.

Task 17. Record the disposition and submit the home study for approval
Set the disposition of the home study to Pending and submit the study to your supervisor for approval.

1. Click **Disposition**. The Disposition Details screen appears.
2. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Do Any of the Listed Verifications Contain Information that would Disqualify the Applicant for Program for which Applied?	No	
Do Any of the Listed Verifications (Except the Home Study Visits) Contain Information that would Cause Limitations/ Restrictions…	No	
Disposition	Approved	
Disposition Date	02/15/2006	Slashes must be entered
Service Limits	2	

Note If a check exists beside the phrase: "Home Study Not completed within 180 days If Checked, Explain" you must enter an explanation in the dialog box to explain the situation or the system will not allow the home study to be approved.

3. Click **Save**. The system returns to the Maintain Home Study Information screen.

4. Write down the provider ID: ________________________
5. Click **Validate for Approval**.

6. The system does not find any information missing. The screen now displays the **Process for Approval** button.

7. Click **Process for Approval.** A dialog box appears.
8. Click **OK**. The Process Approval screen appears.

9. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Action	Routed	
Reviewers/Approvers	Weaver##, Sam	

10. Click **Save**.

Result The system returns to the Maintain Home Study History screen.

Task 18. Record completion of the home study in the activity log
You must create an entry in the activity log when you have completed the home study.

1. In the menu on the left, click **Activity Log**. The Activity Log list screen appears.

2. Click **Add Activity Log**. The Activity Log Details screen appears.

3. Complete the following fields:

Field Name	**Information to Enter/Select**	**Notes**
Responsible Worker	Weaver, Sam	
Activity Start Date	02/15/2006	
Start Time	9:00 AM	
Contact Type	Office Visit	
Category	Foster Home Applicant	
Sub-Category	Application	

4. Type one or two sentences in the **Narrative** field.

5. In the **Activity State** field, select Completed.

6. Click **Save.**

Result The system saves your work and returns to the Activity Log list screen.

Task 19. Approve the home study

You have completed the Home Study and routed it for approval. Next, the agency home study approver's supervisor approves the home study and submits the certification request to ODJFS. Do this task now.

1. Click the **Home Study** link in the menu on the left.

2. Click the **edit** link for the home study you just submitted for approval.

3. Click **Save** on the Home Study Details screen. The Approver's Supervisor would review the Home Study before approving.

4. Click **Validate for Approval**. Ohio SACWIS does not find any information missing. The screen displays the **Process for Approval** button.

5. Click **Process for Approval**.

A dialog box appears. This dialog box is a notification that you *must* generate and save the reports listed in order to view them at a later date. If this process is not completed, you cannot go back and view or create them at a later date.

6. Click **OK**.

7. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Action	Approval-Final	
Reviewers/Approvers	Weaver, Sam	

8. Click **Save**.

Result Ohio SACWIS displays the home study with a status of “Approved” and a disposition of “Approved.”

Task 20. Submit a certification request for approval
If the home study is approved, the home study assessor may submit a recommendation that the provider be certified. Submit this request now.

1. Click the **Approval/Certification** link in the menu on the left.

2. Click the **edit** link for the Foster Care record. The system defaults to Weaver##, Sam in the **Agency Contact Person** field. This is the worker who is recommending to ODJFS that the provider be certified.

Notice that the provider type is Foster Care. The transaction is Initial Recommendation for Certification. (These cannot be changed because this is an approved initial home study.)

3. Enter 02/16/2006 in the **Recommendation Date** field.

4. Click **Apply**.

5. Click **Process Approval**.

6. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Action	Approved and Routed	
Agency	Ohio Department of Job and Family Services	
Reviewers/Approvers	Smith##, Tim	

7. Click **Save**. Ohio SACWIS returns to the Maintain Transactions screen.

Result The recommendation that this provider be certified has been saved to the database and submitted to ODJFS.

Exercise PRM-5. Record a Service Contract

Scenario

The Rolling Stone Counseling Center is a services provider. Your agency is setting up a contract for a special rate that is lower than their base rate. Display the provider record for Rolling Stone Counseling Center, add the new contract, and enter a cost breakdown.

Tasks

Task 1. View the provider

Task 2. Add the contract

Task 3. Add a cost breakdown

Task 1. View the provider
Open the provider record for Rolling Stone Counseling Center.

1. Click the **Directory** tab.

2. In the **Provider Name** field, type *Rolling Stone Counseling Center##*.

3. Click **Search**. The system displays a record for the Rolling Stone Counseling Center.

4. Click the **edit** link beside the center's name.

Result The Provider Overview screen appears.

Task 2. Add the contract
Add a new contract for Rolling Stone Counseling Center.

1. In the menu on the left, click **Contracts**. The Contracts list screen appears.

2. Click **Add Contract**. The Contract Details screen appears.

3. Complete the following fields:

Field Name	**Information to Enter/Select**	**Notes**
Original Contract Begin Date	01/01/2006	
Contract Type	Non-Placement	
Original Contract End Date	12/31/2007	
Original Contracted Amount	5000	
Status	Active	
Comments	This is a new contract with the provider. We will send clients to them at a cost of $50 per session.	

4. Click **Save**.

Result The system saves your work and returns to the Contracts list screen, which now displays the new contract.

Task 3. Add a cost breakdown
Enter a breakdown of placement costs on the Contract Placement Cost Details screen.

1. In the row for the Rolling Stone Counseling Center contract, click the **contract services** link. The Contract Service History screen appears.

2. Click **Add Non-Placement Service Cost.** The Contract Placement Cost Details screen appears.

3. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Agency/Service Description	Franklin County Children Services Board - Individual Counseling	
Contracted Units	100	
Unit Cost	50	

4. Click **Save**. The system saves your work and returns to the Contract Service History screen.

5. Click **Close**.

Result The system returns to the Contracts list screen. You have completed this exercise.

Note Notice the Person Search button on the Contracts list screen: if your contract is with an individual, you can also use this screen to enter service related information.

Exercise PRM-6. Record a withdrawal

Scenario

Foster parents Judy and Randy McCormick have decided not to accept any more children. Revoke their certification as foster parents.

Tasks

Task 1. Record the withdrawal

Task 1. Record the withdrawal
Open the provider case for the McCormicks and recommend that their certification be ended.

1. Click the **Workload** tab.

2. Click **Fox, Rachel**.

3. Find Judy and Randy McCormick in Rachel's workload and click the **select** link beside their name. The system displays the Provider Overview screen.

4. In the menu on the left, click **Approval/Certification**. The Maintain Approval/ Certification Recommendations screen appears.

5. Click **Add Recommendation**. The Maintain Transactions screen appears.

6. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Agency Contact Person	Fox##, Rachel	
Provider Type	Foster Care	
Transaction	Close	
Recommendation Date	12/24/2006	
Closed Reason	Voluntary Withdrawal	

7. Click **Apply**.

8. Click **Process Approval**.

9. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Action	Routed	
Reviewers/Approvers	Sam Weaver	Default

10. Click **Save**.

Result The system submits the withdrawal request to your supervisor and returns to the Maintain Approval/Certification Recommendations screen. You have completed this exercise.

Exercise PRM-7. Record a Shared Home agreement

Scenario

Mandy is a four-year-old toddler, currently in the custody of Adams County Children Services, who resides in a certified foster home. Mandy's foster mother, Amber Jones, is scheduled for minor in-patient surgery. An Adams County worker has contacted Franklin County Children Services to request a temporary placement in a Franklin County foster home.

Create a Shared Home agreement in Ohio SACWIS and assign the provider case to a supervisor in Adams County, Marcia Brandy. As in the previous exercise, play the role of the foster care worker Rachel Fox.

Tasks

Task 1. Record the Shared Home agreement

Task 2. Assign the provider case to an Adams County supervisor

Task 1. Record the Shared Home agreement

Open the provider case for the Betzy Black foster home, and add an agreement.

1. Click the **Workload** tab.

2. Click **Fox, Rachel**. The system displays your (Rachel's) workload.

3. Click the **select** link beside Betzy Black. The Provider Overview screen appears.

4. In the menu on the left, click **Service Credentials**. The Maintain Payment Information screen appears.

5. Click the **Shared Home Agreements** tab.

6. Click **Add Shared Agreement**. The Shared Home Agreement Details screen appears.

7. Complete the following fields:

Field Name	**Information to Enter/Select**	**Notes**
Agency Permitted to Use the Home	Adams County Children Services Board	
Effective Date	Today's date	
Narrative	The Adams County agency has asked to use Ms. Black's home for a 1-week placement. The child's foster mother is in the hospital.	

8. Click **Save**.

Result The system saves your work and returns to the **Shared Home Agreements** tab, which now displays the new agreement.

Task 2. Assign the provider case to an Adams County supervisor
In order for Adams County to set up service credentials for their county on the Betzy Black case, they must have a worker assigned to it. Use the **Assignments** tab to display a list of Adams County employees, and assign Betzy Black's provider case to the supervisor Marcia Brandy.

1. Click the **home** link at the top of the screen.   Then click **OK** in the dialogue box.

2. Click the **Assignments** tab.

3. Click **Fox, Rachel**.

4. Select **Betzy Black** as the foster care provider.

5. Click **Assign**. The system displays the Assign Work Item screen.

6. In the **Agency** field, select Adams County Children Services Board.

7. Click **Show**. The system displays a list of employees in the Adams County agency.

8. Find Marcia Brandy##, and click the **select** link beside her name. The system displays the Employee Assignment screen.

9. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Start Date	Type today's date.	
Roles	Supervisor	

10. Click **Save**.

11. Click **Fox, Rachel**.

12. Click the link for **Betzy Black##** and you are driven to the Provider Overview screen.

13. View Provider Assignment Information and see that Marcia Brady## of Adams County is now assigned to the case.

Result You have assigned this provider to Marcia. You have completed this exercise.

Note When assigning a worker, select the role that allows the worker to perform the functions outlined on the Shared Home Agreement.