OCLQS Portal – Account Management (ODJFS)

Description:
This Job Aid describes the process of performing various actions in the Ohio Child Licensing and Quality System (OCLQS) Portal.

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Action – 1: Registering as an ODJFS Program

This action describes the process of registering for an account on the OCLQS Portal for ODJFS Programs. This is how a new account is created for ODJFS Programs.

**Step 1: Register As ODJFS User**

Click *Register As ODJFS User*
Step 2: Create An Account

1) Enter account information
2) Check box for *I’m not a Robot*
   a. If you are asked a question after checking the box, then answer the question
3) Click *Create My Account*
Step 3: Success Message

Check your email to complete your registration

- If you do not see an email, then click **Resend Email** to have another email sent to the address you entered during the registration

![Create An Account Success Message](image)
**Action – 2: Log in as ODJFS Program**

This action describes the process of logging in to your account on the OCLQS Portal as an ODJFS Program.

Note: If you do not have an OCLQS account, refer to **Action – 1** of this Job Aid for the steps to create an account.

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**Step 1: Log In to the OCLQS Portal**

Click **Log in as ODJFS User**

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**Step 2: Enter Log In Information**

1) Enter **Email** address and **Password**
2) Click **Log In**

Note: If you do not remember your **Email** address and/or **Password**, refer to **Action - 3** of this Job Aid for information on how to get log in information.
Action – 3: Reset Password

This action describes the process of resetting your OCLQS account password.

Note: If you do not have an OCLQS account, refer to Action – 1 of this Job Aid for the steps to create an account.

If you do not know the email address for your account please call 1-877-302-2347, option 1.

Step 1: Log In to the OCLQS Portal

Click Log in as ODJFS User

Step 2: Click Forgot Password

Click Forgot Password
Step 3: Submit Reset Password Request

1) **Enter your Email Address**
2) Click **Submit**

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Step 4: Success Message

Click **OK**

*Note: You will be sent an email to reset your password. Click the link in that email to reset your password.*
Step 5: Enter Password Information

1) Enter new **Password** and **Verify Password**
2) Click **Submit**

Step 6: Success Message

Click **Go To Dashboard**
**Action – 4: Log out**

*This action describes the process of logging out of an account on the OCLQS Portal.*

### Step 1: Hover Over Name

Hover over your name to the top right of the screen

### Step 2: Click Logout

Click **Logout**
Action – 5: Manage Profile

This action describes the process of managing your account profile including updating email and password for the OCLQS Portal.

Step 1: Hover Over Name

Hover over your name to the top right of the screen

Step 2: Click Manage Profile

Click Manage Profile
Step 3: Submit Information

1) Enter Information
2) Click **Submit**
Step 4: Go To Dashboard

Click **Go To Dashboard**
Action – 6: View Dashboard

This action describes the process of viewing the account Dashboard on the OCLQS Portal.

**Step 1: Click Dashboard**

Click **Dashboard**

Note: Clicking **Dashboard** will return you to the account Dashboard.
Action – 7: View Messages

This action describes the process of viewing messages associated to an account on the OCLQS Portal.

**Step 1: Click Messages**

Click *Messages*.

**Step 2: Find Message**

1) Enter information about the message in the *Search* box to search for the message (e.g. message subject, date)

2) If a document is associated to the message, then click *View Document* in the *Document Link* column to view the document

3) Click subject in the *Message Subject* column
Step 3: Read Message

1) Read Message Details
2) To view a printable version of the message click Print
Action – 8: View Documents

This action describes the process of viewing documents on the OCLQS Portal. Please refer to the OCLQS Portal Document Management Job Aid for additional information about uploading documents during the Applications/Amendment submission process or sending an updated version of the document if it has been returned for revision.

Step 1: Click Documents

Click *Documents*

![Image of OCLQS Portal with Documents tab highlighted](image)

Step 2: Find Document

1) Enter information about the document in the *Search* box to search for the document (e.g. name, type)

2) Click document name in the *Document Name* column

*Note: You can also use the *Document Status* filter to search for the document.*
Step 3: Click View Document

Click **View Document**

*Note: The document will be downloaded on your computer. Where the document downloads will vary depending upon your internet browser.*

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Step 4: Go Back to Documents Screen

Click **Go Back** to return to the **Documents** screen.
Action – 9: View System Users

This action describes the process to view system users who have access to the Portal account. Please refer to the OCLQS Portal ODJFS Add/Remove System User Job Aid for more information on adding, removing, and editing system users.

Step 1: Click Messages

Click Add System User

Step 2: Search for a System User

Enter the name of the existing user in the Search field
Step 3: Click Name

Click the name of the existing system user in the Name column.
Step 3: View User Information

1) View information related to the system user
2) Click **Back** to return to the system user list
Action – 10: Search for a Program

This action describes the process of searching for a program on the OCLQS Portal.

Step 1: Enter Program Information

Enter program information (e.g. program name, number, status) in the text box
Step 2: Find the Program

Find the program

*Note: You can click the program box to access the program.*
**Action – 11: View License Inspections, SUTQ Onsites, and Serious Incidents**

This action describes the process of viewing license inspections, SUTQ onsite visits, and serious incident reports on the OCLQS Portal.

### Step 1: Select the Program

Click anywhere in the program card

![Select Program Card](image)
Step 2: Find Document to View

Click the icon for the document that you would like to view

Click the icon below for the document you would like to view
Step 3: Click Document Name

Click the document name above **Ready to Download**

Note: The document will be downloaded on your computer. Where the document downloads will vary depending upon your internet browser.
**Action – 12: Continue/Revise Application**

This action describes the process of continuing/revising an application on the OCLQS Portal.

### Step 1: Select the Program

Click anywhere in the program card

![Program Card Image]
Step 2: Manage Programs

Click **Manage Programs**

![Manage Programs](image)

Step 3: Continue Application

Click **Continue Application**

Note: The buttons available on this screen will vary depending on the status of the program. If the application has already been submitted, then the **Revise Application** button will display. To revise the application you will need to confirm that you would like to proceed.

![Continue Application](image)
Action – 13: Update/Withdraw Amendment

This action describes the process of updating/withdrawing an amendment on the OCLQS Portal.

**Step 1: Select the Program**

Click anywhere in the program card
Step 2: Manage Programs

Click **Manage Programs**

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Step 3: Request Amendment

Click **Request Amendment**
Step 4: Select Withdraw or Update

Click **Withdraw** or **Update**

Note: If you click **Update**, then you will proceed to the amendment to be updated. If you click **Withdraw**, then proceed to the next step.

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Click **Withdraw** or **Update**

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Step 5: Confirm Withdrawing the Amendment

Click **Confirm**
**Action – 14: Save Information and Download Summary Reports**

This action describes the results of selecting different buttons in the OCLQS Portal.

### Step 1: View Activity History Section

The following buttons are displayed at various points in the OCLQS Portal. The action from each button is listed below.

- **Save & Finish Later**: You will receive a confirmation message. If you click Exit then your information will be saved and you will return to the Dashboard.
- **Save and Continue**: You will continue to the next screen in the process.
- **Download Report**: A document will be downloaded that will include information entered in the application or amendment to this point. You can click the document name to view the document.

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**Save & Finish Later**: You will receive a confirmation message. If you click Exit then your information will be saved and you will return to the Dashboard.

**Save and Continue**: You will continue to the next screen in the process.

**Download Report**: A document will be downloaded that will include information entered in the application or amendment to this point. You can click the document name to view the document.