



OCLQS Portal – Document Management

Description:

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

Table of Contents:

Action	Title	Description
Action – 1	View Documents	Viewing documents
Action – 2	Upload New Document	Uploading a new document when submitting applications, registrations, and amendments
Action – 3	Choose Previously Uploaded Document	Choosing a document that has been previously uploaded and approved when submitting applications, registrations, and amendments
Action – 4	View Document Associated to a Message	Viewing documents associated to a message
Action – 5	Upload Document Returned for Revision	Uploading documents to replace previously submitted documents that have been returned for revision
Action – 6	Download Summary Reports	Downloading summary reports of applications and amendments entered in OCLQS
Action – 7	View Licensing Inspections, SUTQ Onsite Visits, and Serious Incidents	Viewing information concerning Licensing Inspections, Step Up To Quality (SUTQ) Onsite Visits, and Serious Incidents

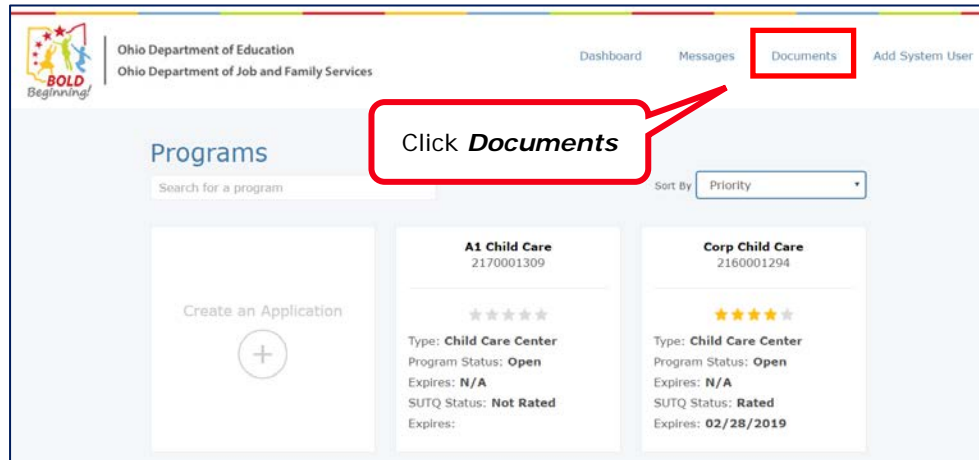


Action – 1: View Documents

This action describes the process of viewing documents on the OCLQS Portal.

Step 1: Click Documents

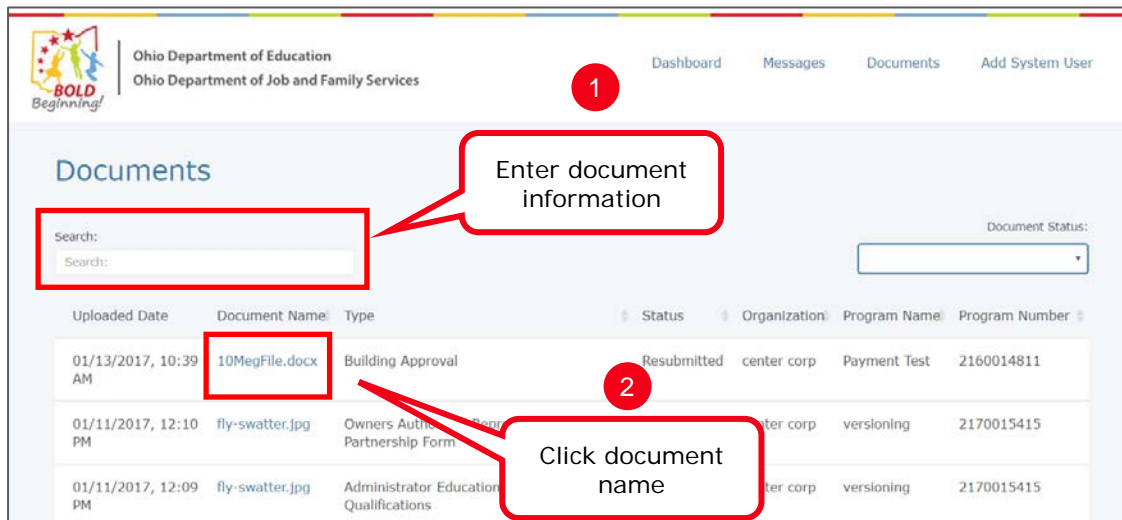
Click **Documents**



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.

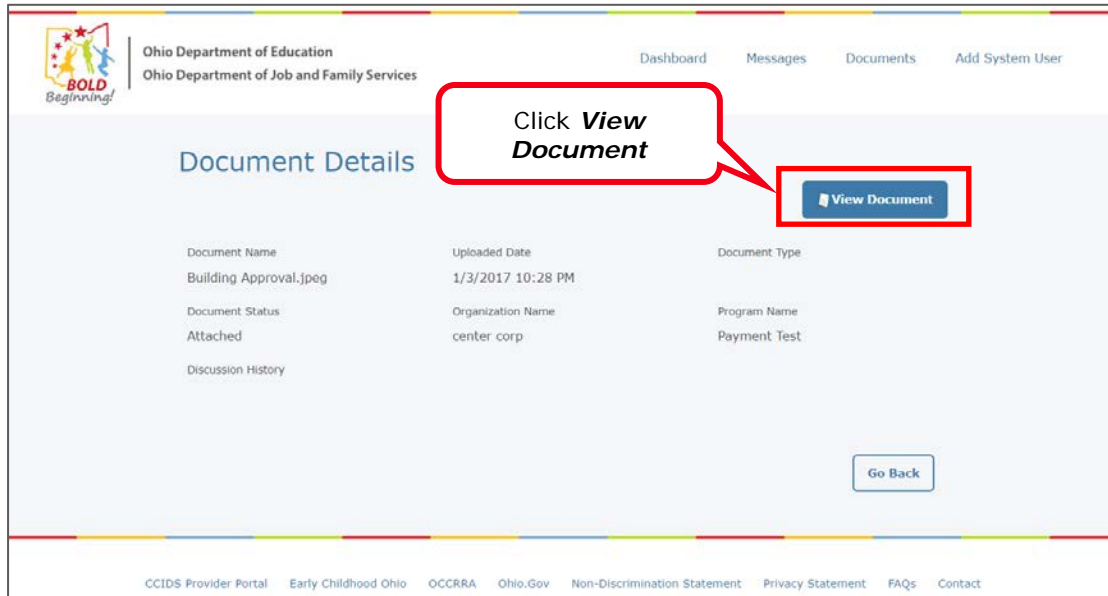




Step 3: Click View Document

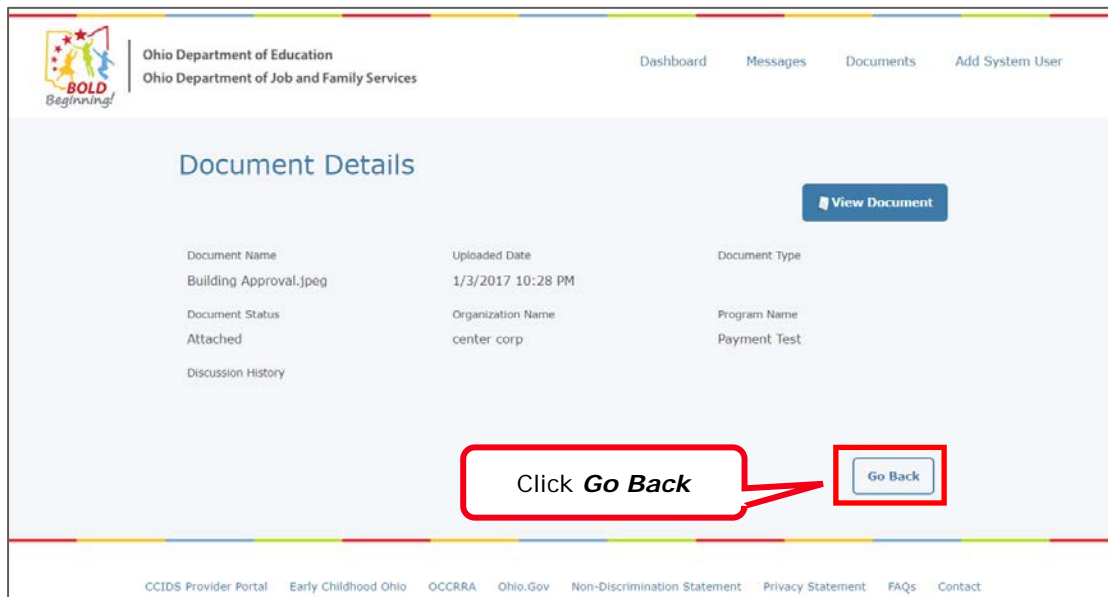
Click **View Document**

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



Step 4: Go Back to Documents Screen

Click **Go Back** to return to the **Documents** screen

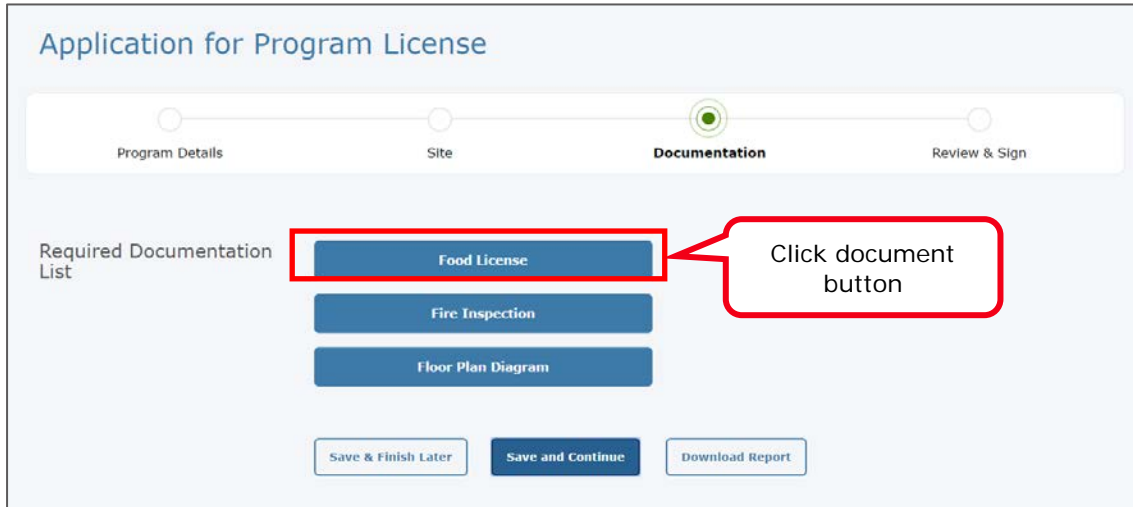


Action – 2: Upload New Document

This action describes the process of uploading a new document in the OCLQS Portal. When documents are required during applications, registrations, and amendments a screen similar to the one in Step 1 of this action will be displayed. At that point you can follow the steps in this action.

Step 1: Attach Required Documents

Click the first document button



Application for Program License

Program Details Site **Documentation** Review & Sign

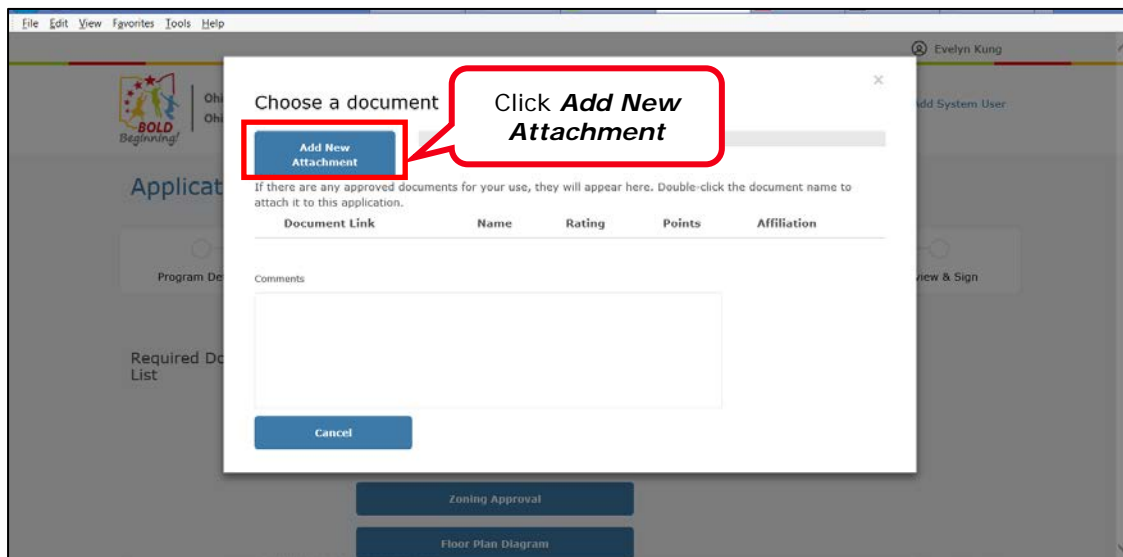
Required Documentation List

- Food License
- Fire Inspection
- Floor Plan Diagram

Save & Finish Later Save and Continue Download Report

Step 2: Click Add New Attachment

Click **Add New Attachment**



File Edit View Favorites Tools Help

Choose a document

Add New Attachment

If there are any approved documents for your use, they will appear here. Double-click the document name to attach it to this application.

Document Link	Name	Rating	Points	Affiliation
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Comments

Cancel

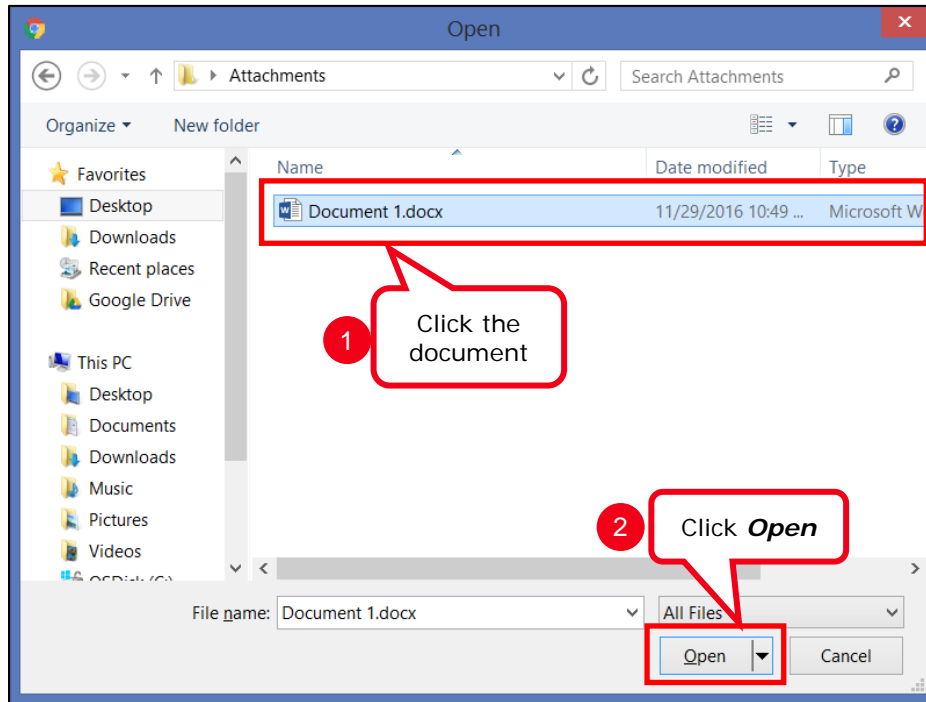
Zoning Approval

Floor Plan Diagram

Step 3: Select Document

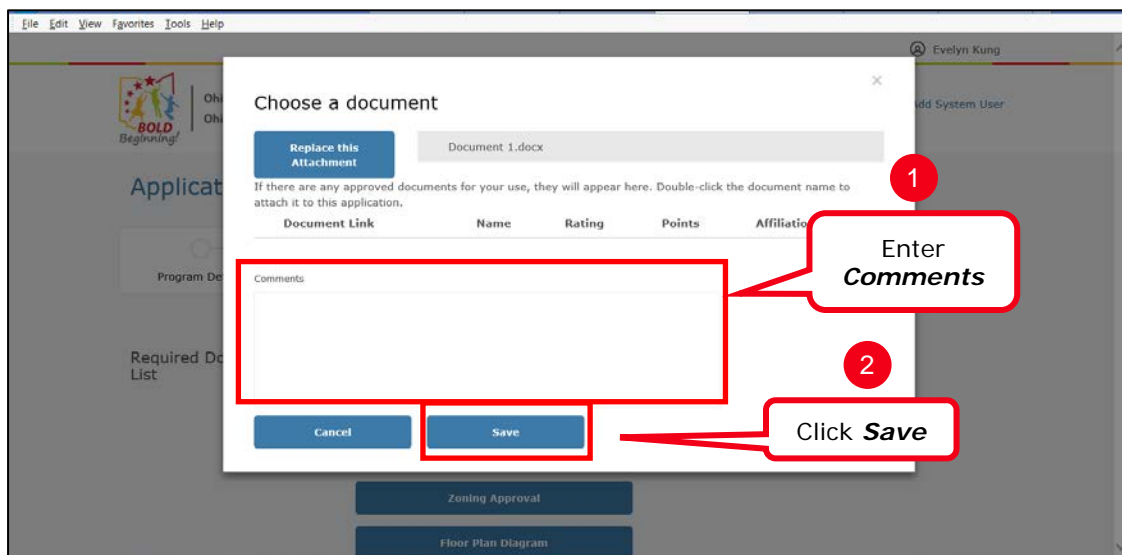
- 1) Select the document to attach
- 2) Click **Open**

Note: The view of this step will vary depending on the internet browser you are using.



Step 4: Save the Attached Document

- 1) Enter document **Comments** if applicable
- 2) Click **Save**





Step 5: Attach Other Required Documents

The document has been uploaded. Repeat the steps in [Action – 2](#) or [Action – 3](#) to upload additional documents.

Note: When a document is added, the document name displays to the right of the document button.

Application for Program License

Progress bar: Program Details | Site | **Documentation** | Review & Sign

Required Documentation List

✓	Food License (added)	Test Document.docx
✓	Fire Inspection (added)	Test Document.docx
✓	Floor Plan Diagram (added)	Test Document.docx

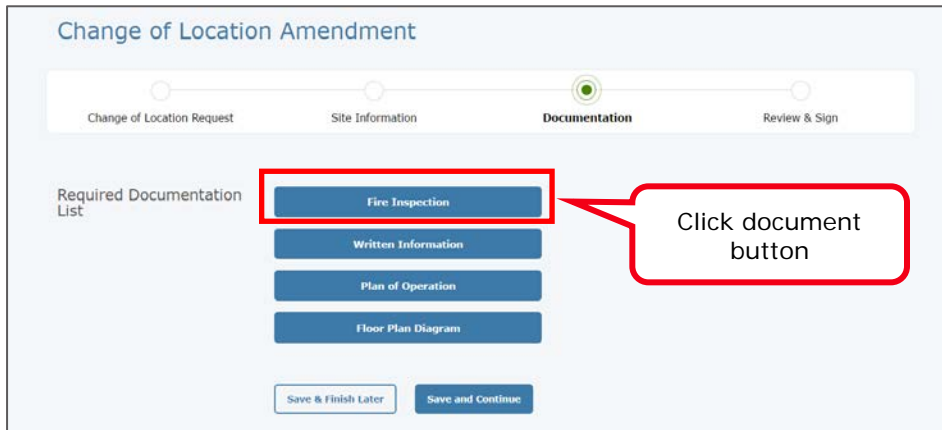
Buttons: Save & Finish Later | Save and Continue | Download Report

Action – 3: Choose Previously Uploaded Document

This action describes the process of choosing a document that has been previously uploaded when submitting applications, registrations, and amendments. This option will only be available when a document of the same type has been previously approved. When documents are required during applications, registrations, and amendments, a screen similar to the one in Step 1 of this action will be displayed. At that point you can follow the steps in this action.

Step 1: Attach Required Documents

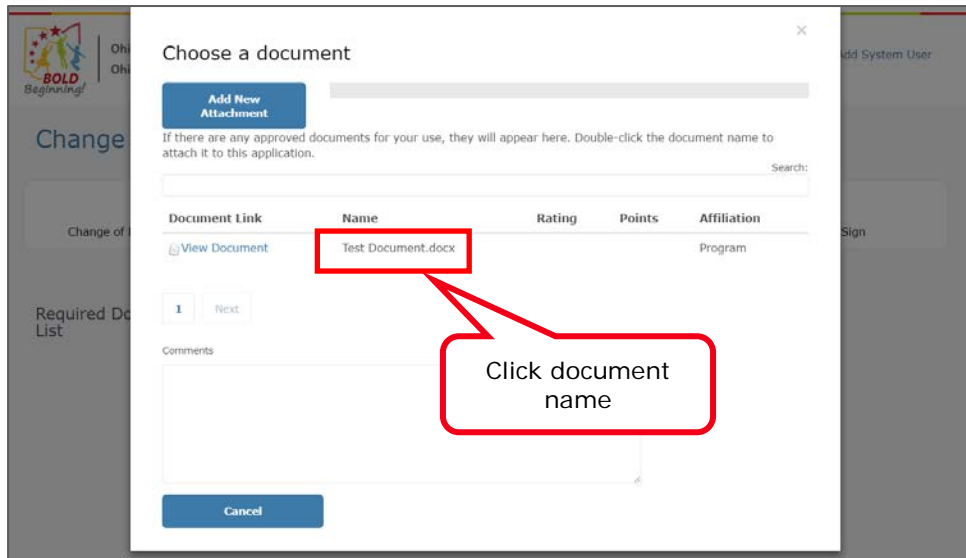
Click the document button



Step 2: Click Document Name

Click the document name in the **Name** column for the document you would like to select

*Note: You can click **View Document** if you would like to view the document before you select it.*





Step 3: Save the Attached Document

- 1) Enter document **Comments** if applicable
- 2) Click **Save**

Choose a document

Add New Attachment Test Document.docx

If there are any approved documents for your use, they will appear here. Double-click the document name to attach it to this application.

Search:

Document Link	Name	Rating	Points	Affiliation
View Document	Test Document.docx			

1 Next

Comments

Cancel Save

Enter **Comments**

Click **Save**

Step 4: Attach Other Required Documents

The document has been uploaded. Repeat the steps in [Action – 2](#) or [Action – 3](#) to upload additional documents.

Note: When a document is added, the document name displays to the right of the document button.

Change of Location Amendment

Change of Location Request Site Information **Documentation** Review & Sign

Required Documentation List

- ✓ Fire Inspection (added)
- Written Information
- Plan of Operation
- Floor Plan Diagram

Test Document.docx

Save & Finish Later Save and Continue

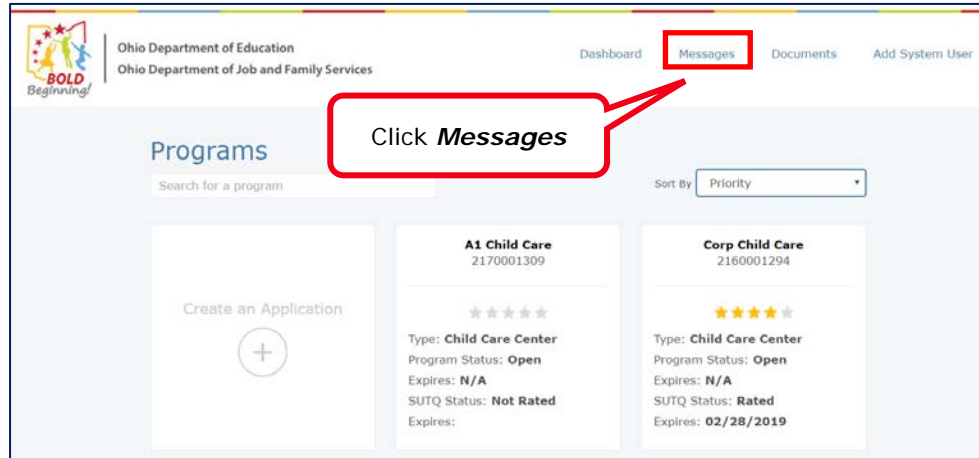


Action – 4: View Document Associated to a Message

This action describes the process of viewing documents associated to a message on the OCLQS Portal. Please note that not all messages have documents associated to them.

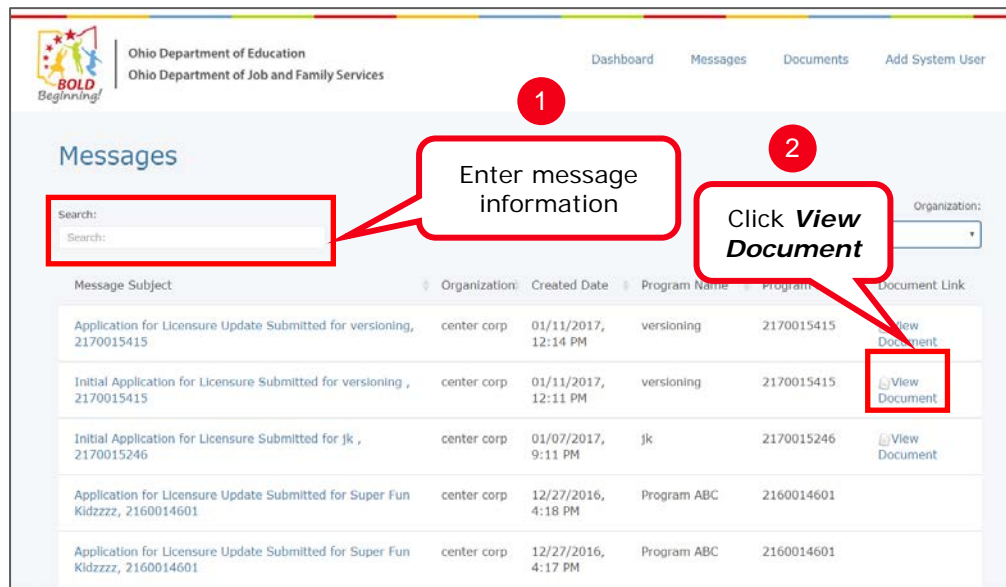
Step 1: Click Messages

Click **Messages**



Step 2: View Document

- 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 it



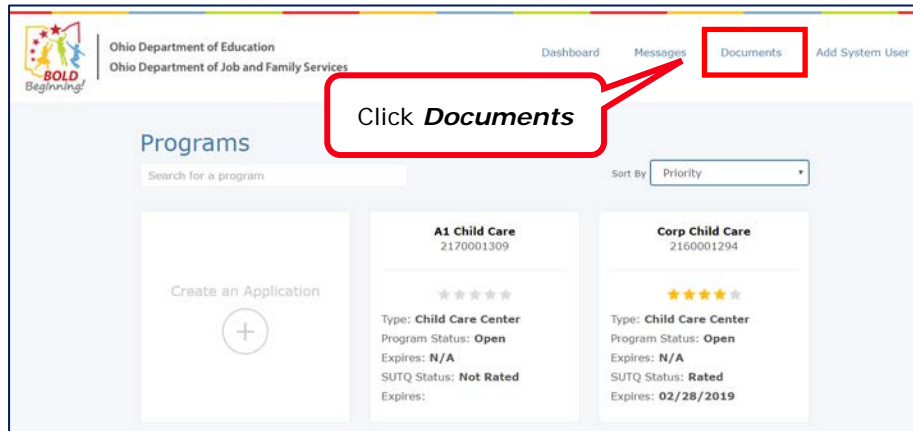


Action – 5: Upload Document Returned for Revision

This action describes the process of uploading documents to replace previously submitted documents that have been returned for revision.

Step 1: Click Documents

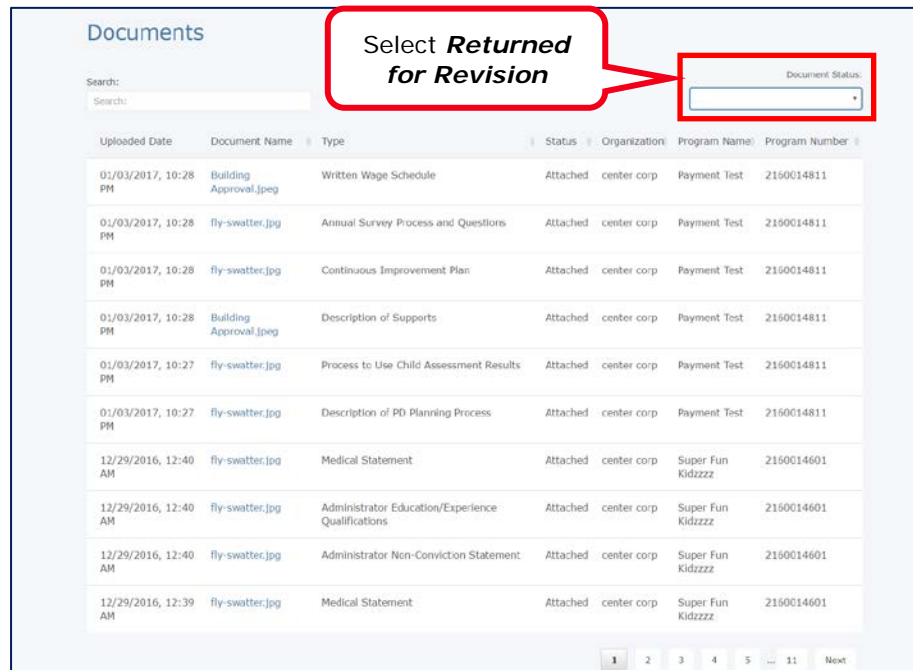
Click **Documents**



Step 2: Select Returned for Revision

Click the Drop Down Arrow and select **Returned for Revision** in the **Document Status** field

Note: You can also use the **Search** box to search for documents with document information (e.g. name).





Step 3: Click Document Name

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

Ohio Department of Education
Ohio Department of Job and Family Services

Dashboard Messages Documents Add System User

Documents

Search:

Document Status: Returned for Revision

Uploaded Date	Document Name	Type	Status	Organization	Program Name	Program Number
12/27/2016, 11:04 AM	9351 CAP.docx	Building Approval	Returned for Revision	center corp	Payment Test	2160014811
12/18/2016, 4:00 PM	JFS-02-120 -- Inspection - Pre-license Full - initial bugs (6).docx	Food License Exemption	Returned for Revision		Payment Test	2160014811

1 Next

Step 4: Click New Version

- 1) Read **Document Details** of the document initially uploaded
- 2) Click **New Version of this...**

Note: The text of the **New Version of this...** will end with the type of document.

Document Details

View Document

Document Name	Uploaded Date	Document Type
JFS-02-120 -- Inspection - Pre-license Full - initial bugs (6).docx	12/18/2016 4:00 PM	
Document Status	Organization Name	Program Name
Returned for Revision		Payment Test
Discussion History		
s		
Anne Cho 2016-12-27 15:52:58		
Document Comments	<input type="text"/>	

Attachment Upload

Upload attachments by clicking below:

New Version of this Food License Exemption

JFS-02-120 -- Inspection - Pre-license Full - initial bugs (6).docx

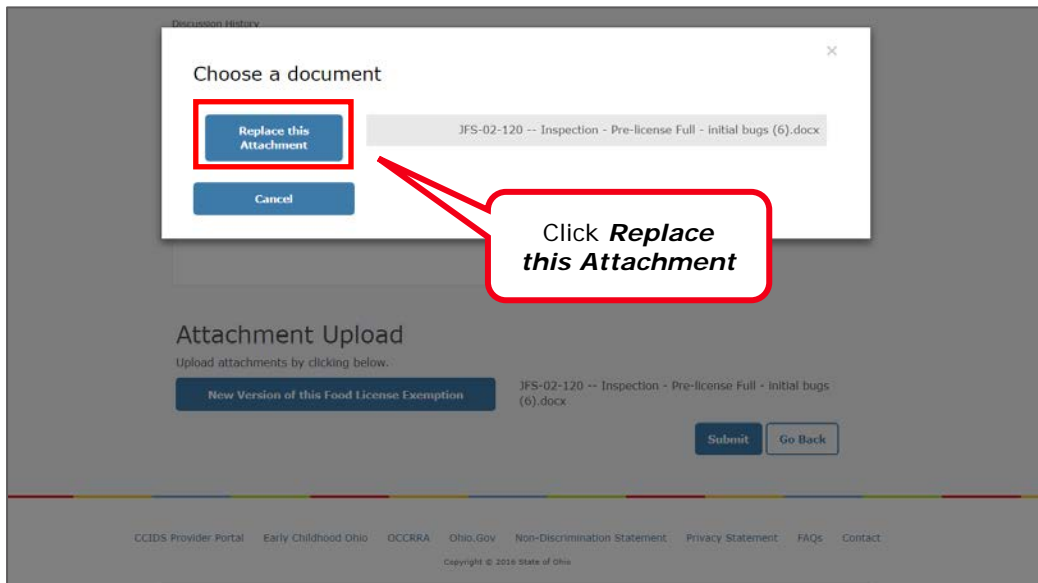
Submit Go Back

1 Read Document Details

2 Click **New Version of this...**

Step 5: Replace this Document

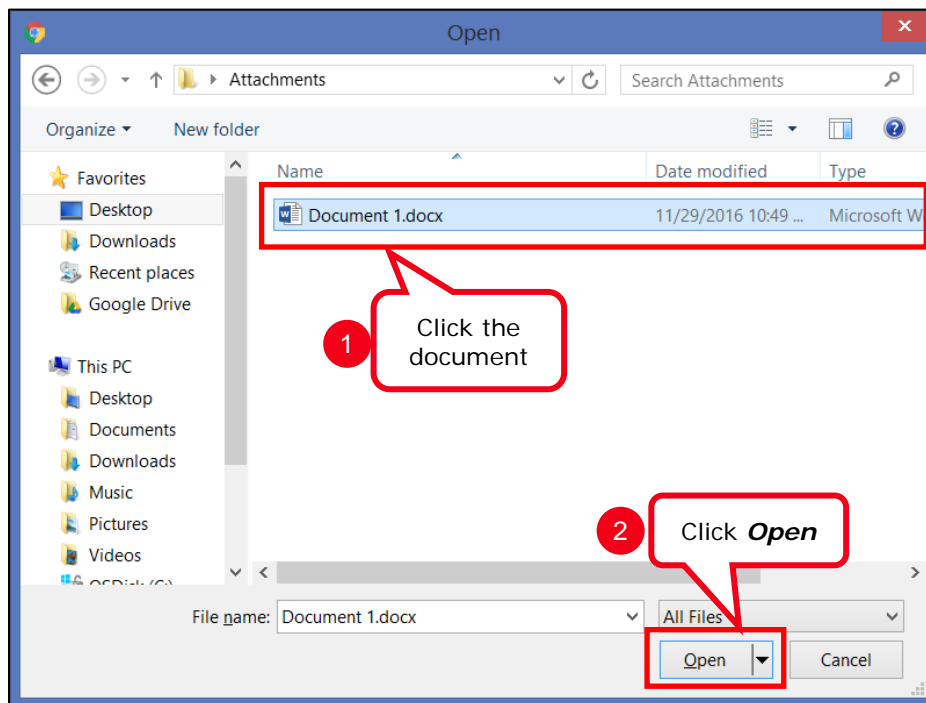
Click **Replace this Attachment**



Step 6: Select Document

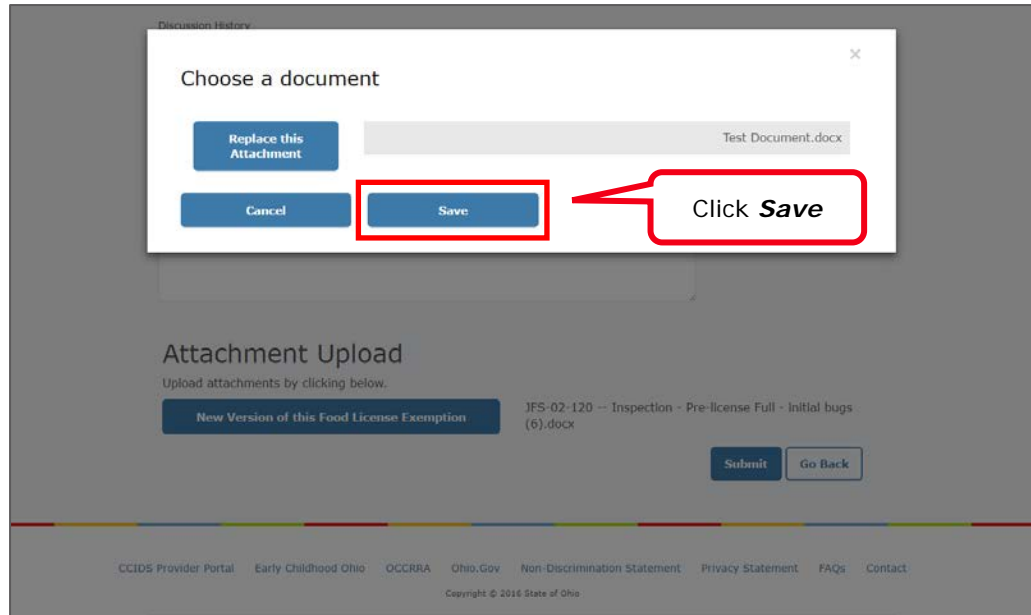
- 1) Select the document to attach
- 2) Click **Open**

Note: The view of this step will vary depending on the internet browser you are using.



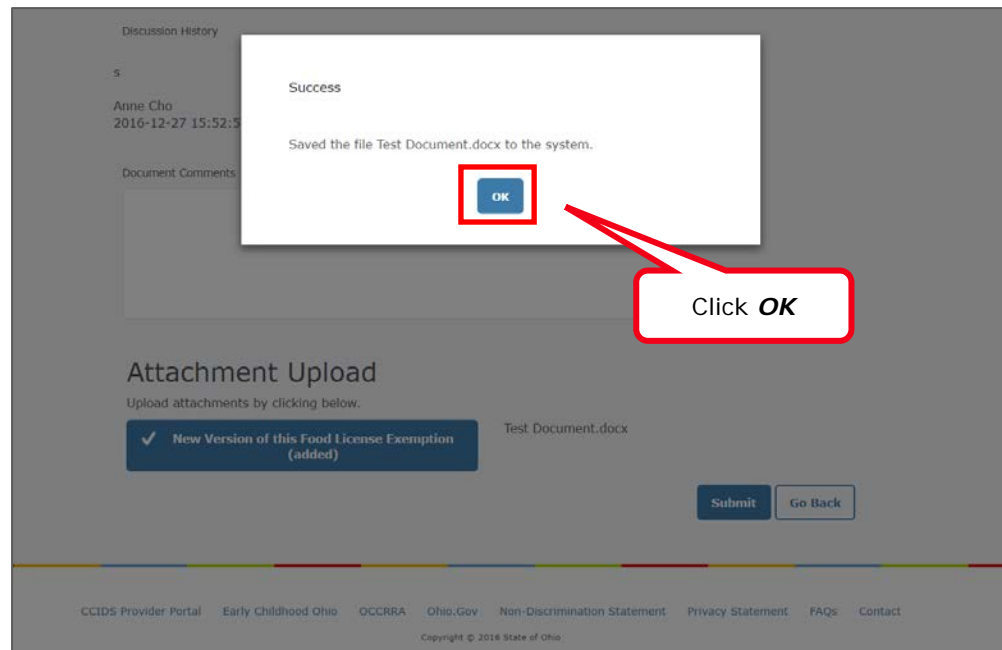
Step 7: Click Save

Click **Save**



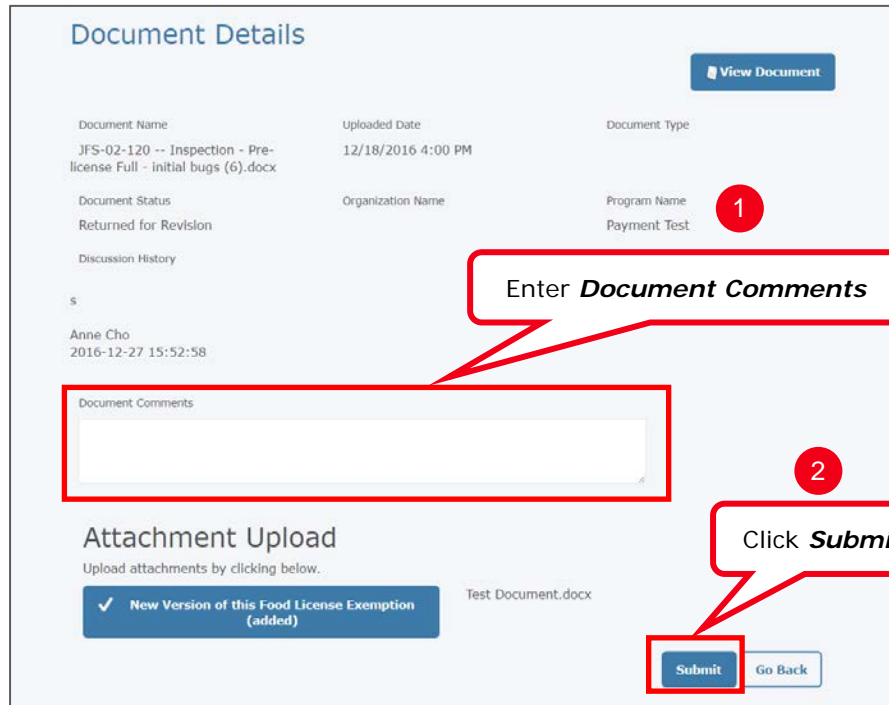
Step 8: Click OK

Click **OK**



Step 9: Submit Document

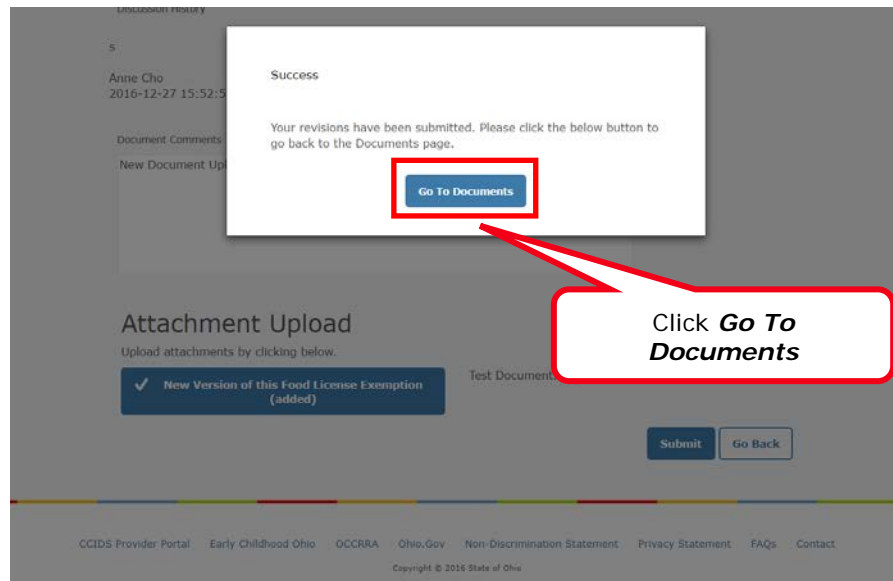
- 1) Enter **Document Comments** if applicable
- 2) Click **Submit**



The screenshot shows the 'Document Details' page. A 'View Document' button is in the top right. The document information includes: Document Name (JFS-02-120 -- Inspection - Pre-license Full - initial bugs (6).docx), Uploaded Date (12/18/2016 4:00 PM), Document Type (Payment Test), Document Status (Returned for Revision), Organization Name, and Program Name (Payment Test). A red circle with the number '1' is placed over the Program Name field. Below this is a 'Document Comments' text area, which is highlighted with a red box and a callout bubble that says 'Enter **Document Comments**'. Below the comments area is the 'Attachment Upload' section, which shows a 'New Version of this Food License Exemption (added)' button and a 'Test Document.docx' file. A red circle with the number '2' is placed over the 'Submit' button, with a callout bubble that says 'Click **Submit**'. A 'Go Back' button is also visible next to the 'Submit' button.

Step 10: Go To Documents Screen

Click **Go To Documents** to return to the **Documents** screen



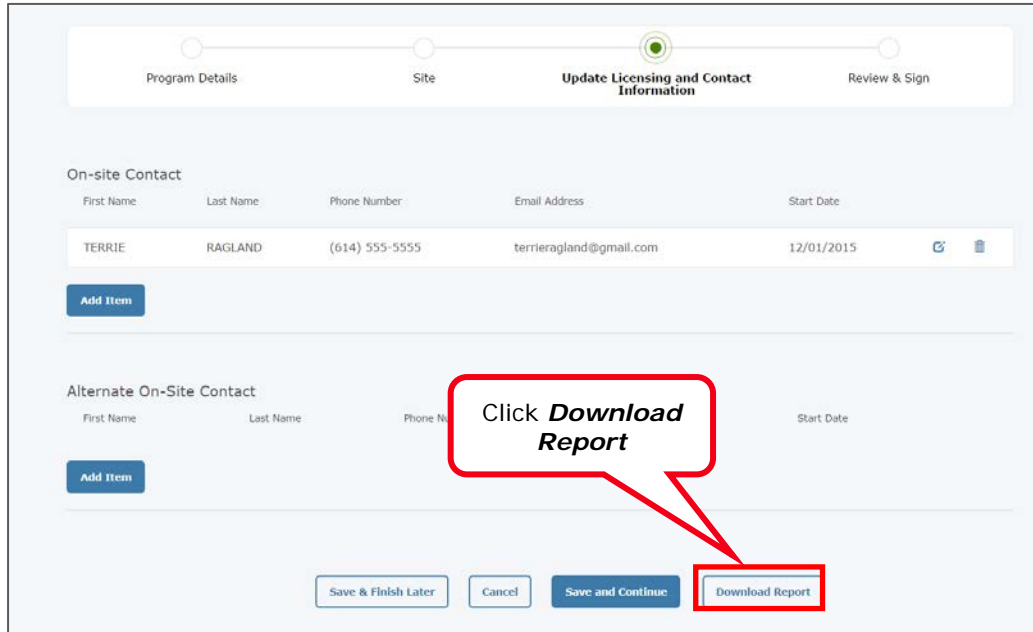
The screenshot shows the 'Success' message overlay on the 'Document Details' page. The message reads: 'Success. Your revisions have been submitted. Please click the below button to go back to the Documents page.' A red box highlights the 'Go To Documents' button. A callout bubble points to this button with the text 'Click **Go To Documents**'. The background of the page is dimmed, showing the 'Attachment Upload' section and the 'Submit' and 'Go Back' buttons.

Action – 6: Download Summary Reports

This action describes the process of downloading summary reports of the information entered in an application or amendment. The **Download Report** button displays at various locations in the OCLQS Portal and the document downloaded when this is clicked will contain the information entered in the application or amendment to that point.

Step 1: Click Download Report

Click **Download Report**



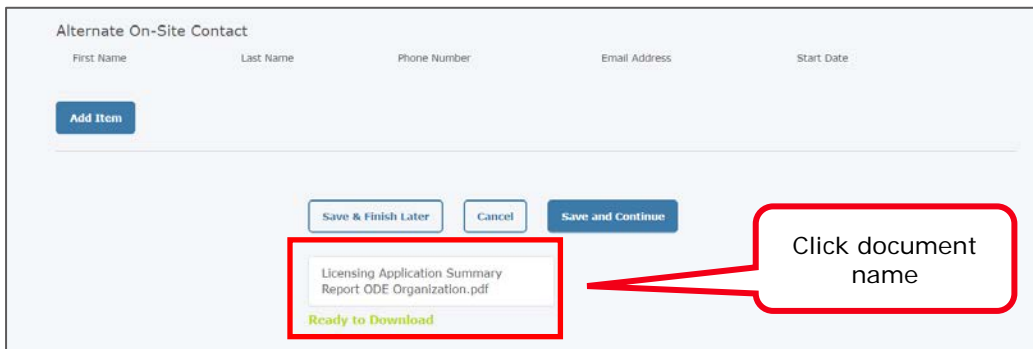
First Name	Last Name	Phone Number	Email Address	Start Date
TERRIE	RAGLAND	(614) 555-5555	terrieragland@gmail.com	12/01/2015

First Name	Last Name	Phone Number	Email Address	Start Date
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Step 2: 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.



First Name	Last Name	Phone Number	Email Address	Start Date
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Licensing Application Summary Report.ODE Organization.pdf
Ready to Download



Action – 7: 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

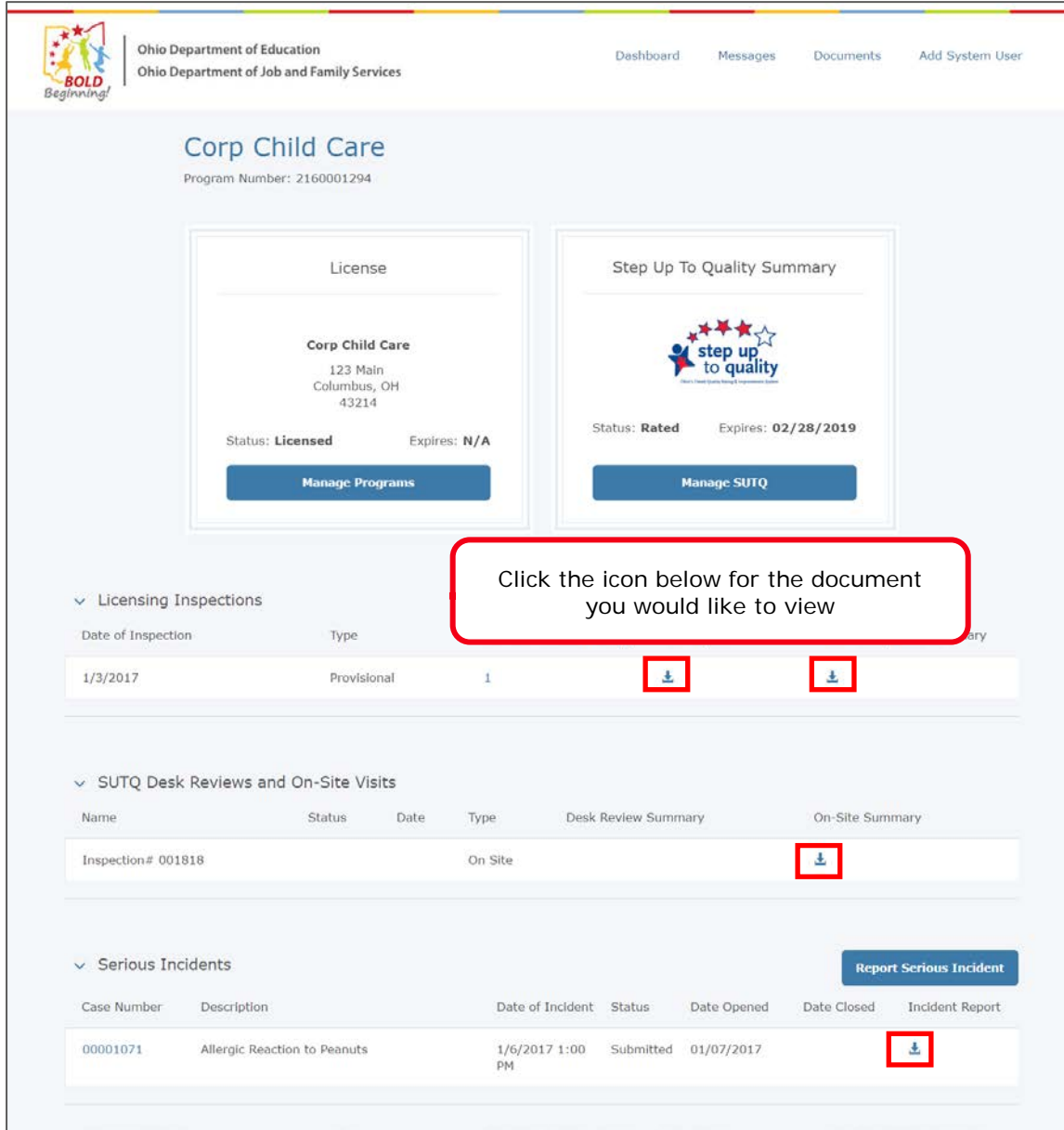
The screenshot displays the 'Programs' section of the OCLQS Portal. At the top left is the 'BOLD Beginning!' logo and the text 'Ohio Department of Education' and 'Ohio Department of Job and Family Services'. Navigation links for 'Dashboard', 'Messages', 'Documents', and 'Add System User' are at the top right. The main heading is 'Programs' with a search bar below it. A 'Sort By' dropdown menu is set to 'Priority'. The program cards are as follows:

Program ID	Type	Program Status	Expires	SUTQ Status	Expires
2170001309	Child Care Center	Open	N/A	Not Rated	
2160001294	Child Care Center	Open	N/A	Rated	02/28/2019



Step 2: Select the Document to View

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



The screenshot shows the Ohio Department of Education portal for a Corp Child Care program. It features two main document cards: 'License' and 'Step Up To Quality Summary'. Below these are three tables of inspection records. A red box highlights a callout text: 'Click the icon below for the document you would like to view'. Three download icons are circled in red: two in the 'Licensing Inspections' table and one in the 'SUTQ Desk Reviews and On-Site Visits' table.

Ohio Department of Education
Ohio Department of Job and Family Services

Dashboard Messages Documents Add System User

Corp Child Care

Program Number: 2160001294


License

Corp Child Care
123 Main
Columbus, OH
43214

Status: **Licensed** Expires: **N/A**

Manage Programs

Step Up To Quality Summary





Status: **Rated** Expires: **02/28/2019**


Manage SUTQ

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


▼ Licensing Inspections

Date of Inspection	Type			
1/3/2017	Provisional	1		

▼ SUTQ Desk Reviews and On-Site Visits

Name	Status	Date	Type	Desk Review Summary	On-Site Summary
Inspection# 001818			On Site		

▼ Serious Incidents [Report Serious Incident](#)

Case Number	Description	Date of Incident	Status	Date Opened	Date Closed	Incident Report
00001071	Allergic Reaction to Peanuts	1/6/2017 1:00 PM	Submitted	01/07/2017		



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.

Ohio Department of Education
Ohio Department of Job and Family Services

Dashboard Messages Documents Add System User

Corp Child Care

Program Number: 2160001294

License

Corp Child Care
123 Main
Columbus, OH
43214

Status: **Licensed** Expires: **N/A**

Manage Programs

Step Up To Quality Summary

Status: **Rated** Expires: **02/28/2019**

Manage SUTQ

▼ Licensing Inspections

Date of Inspection	Type	Corrective Action Plan(s)	Full Report	Non-Compliance Summary
1/3/2017	Provisional	1	<div style="border: 1px solid red; padding: 2px;">Licensing Inspection Full Summary Report.pdf Ready to Download</div>	

▼ SUTQ Desk Reviews and On-Site Visits

Name	Status	Date	Type	Desk Review Summary	On-Site Summary
Inspection# 001818			On Site		

▼ Serious Incidents Report Serious Incident

Case Number	Description	Date of Incident	Status	Date Opened	Date Closed	Incident Report
00001071	Allergic Reaction to Peanuts	1/6/2017 1:00 PM	Submitted	01/07/2017		