OQLQS 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 (OQLQS) Portal.

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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.

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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](image)

Click document button

Step 2: Click Add New Attachment

Click Add New Attachment

![Choose a document](image)
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](image)
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

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.
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

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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.*
**Step 5: Replace this Document**

Click *Replace this Attachment*

![Image of Replace this Attachment dialog box]

**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**

Step 10: Go To Documents Screen

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

**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.*
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
Step 2: Select the 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.*