



## OCLQS Portal – Update Banking Information

### Description:

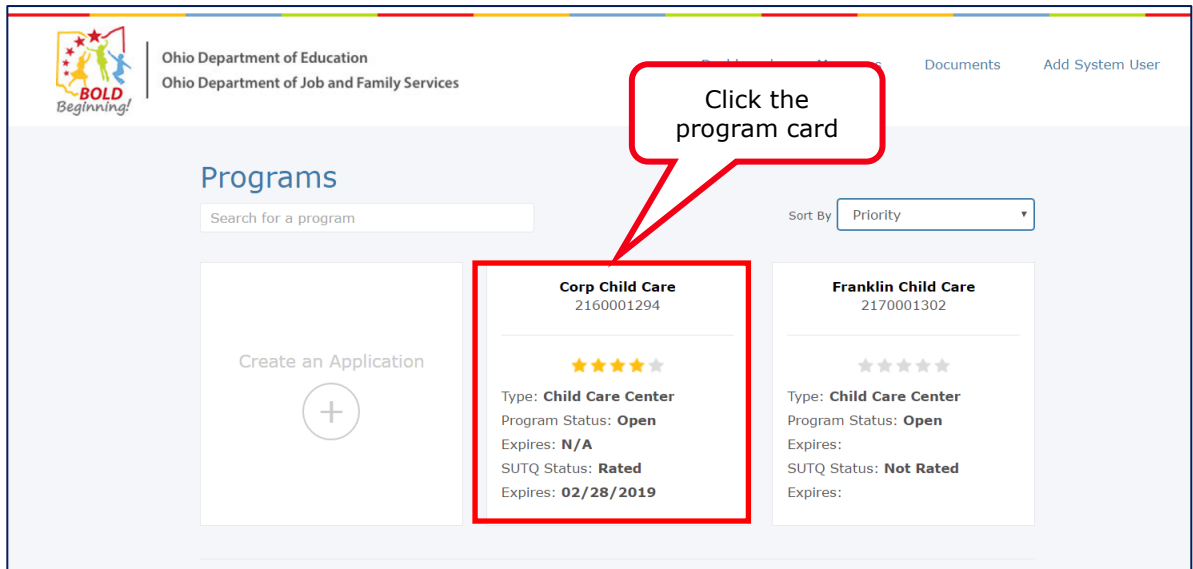
This Job Aid describes the process of Updating Banking Information in the OCLQS Portal.

### Related Job Aid(s):

- OCLQS Portal – PFCC Application
- OCLQS Portal – Account Management

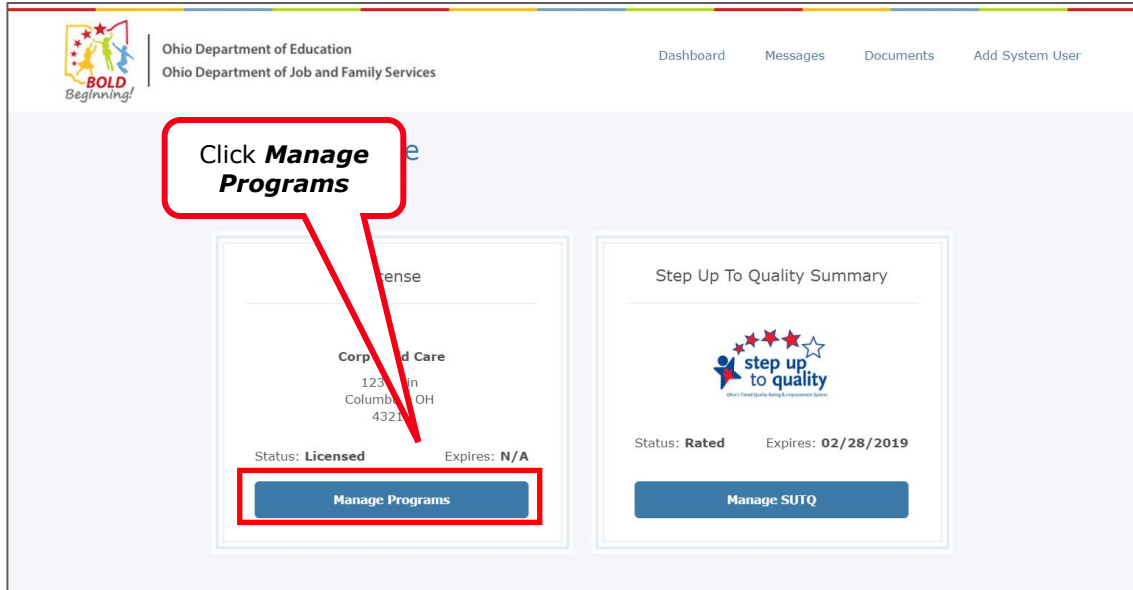
### Step 1: Select the Program

- Log in to the OCLQS Portal
  - For information on OCLQS Portal login, refer to the **OCLQS Portal – Account Management Job Aid**.
- Click anywhere on the program card.



## Step 2: Manage Programs

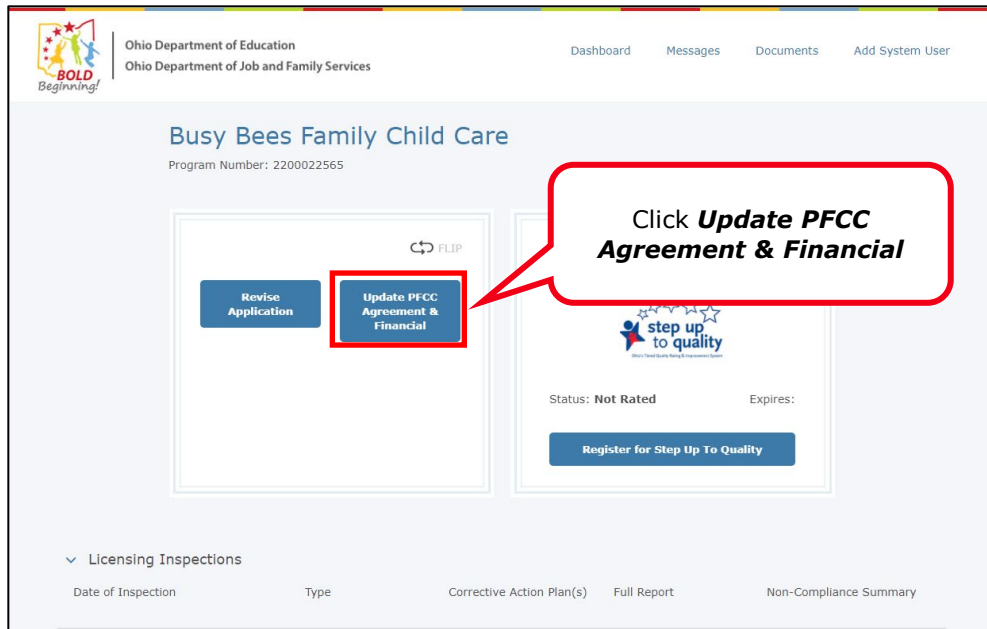
Click **Manage Programs**.



The screenshot shows the OCLQS Portal dashboard. At the top left is the logo for the Ohio Department of Education and Department of Job and Family Services. The top right has navigation links: Dashboard, Messages, Documents, and Add System User. The main content area features two cards. The left card is for 'Corporate Child Care' with details: '123 Main Street, Columbus, OH 43210'. It shows 'Status: Licensed' and 'Expires: N/A'. A red box highlights the 'Manage Programs' button at the bottom of this card. A red callout bubble points to this button with the text 'Click **Manage Programs**'. The right card is for 'Step Up To Quality Summary' with the 'step up to quality' logo and 'Status: Rated' and 'Expires: 02/28/2019'. It has a 'Manage SUTQ' button at the bottom.

## Step 3: Update PFCC Agreement & Financial

Click **Update PFCC Agreement & Financial**.



The screenshot shows the program page for 'Busy Bees Family Child Care' with Program Number 2200022565. The top navigation is the same as in Step 2. The main content area has two cards. The left card has a 'FLIP' icon and two buttons: 'Revise Application' and 'Update PFCC Agreement & Financial'. The 'Update PFCC Agreement & Financial' button is highlighted with a red box. A red callout bubble points to it with the text 'Click **Update PFCC Agreement & Financial**'. The right card has the 'step up to quality' logo and 'Status: Not Rated' and 'Expires:'. It has a 'Register for Step Up To Quality' button at the bottom. Below the cards is a section for 'Licensing Inspections' with a table header: Date of Inspection, Type, Corrective Action Plan(s), Full Report, and Non-Compliance Summary.



## Step 4: Update Banking

Click **Update Banking**.

The screenshot shows the 'Update Information' page of the OCLQS Portal. The page header includes the Ohio Department of Education and Department of Job and Family Services logos, along with navigation links for 'Dashboard', 'Messages', and 'Documents'. The main content area is titled 'Update Information' and contains five sections, each with a description and a corresponding button:

- End PFCC Agreement**: Use this functionality to end your PFCC provider agreement. Button: **End PFCC Agreement**
- Update Banking**: Use this functionality to add or update Bank Information. Button: **Update Banking** (highlighted with a red box and a callout bubble that says 'Click **Update Banking**')
- Update Tax**: Use this functionality to add or update Tax Information. Button: **Update Tax**
- Update Accreditation**: Use this functionality to add or update Accreditation. Button: **Update Accreditation**
- Update Customary Rates**: Use this functionality to add or update Customary Rates. Button: **Update Customary Rates**

The footer of the page contains links for 'CCIDS Provider Portal', 'Early Childhood Ohio', 'OCCRRA', 'Ohio.Gov', 'Non-Discrimination Statement', 'Privacy Statement', 'FAQs', and 'Contact', along with a copyright notice for 2016 State of Ohio.



## Step 5: Bank Information Detail Page

- 1) Enter information in **Bank Information** section.
- 2) Click **Save and Continue**.

The screenshot shows the 'Update Bank Information' page. At the top, there is a navigation bar with the logo, department names, and links for Dashboard, Messages, Documents, and Add System User. Below this is a progress indicator with three steps: 'Update Bank' (active), 'Documentation', and 'Review & Sign'. The main content area is titled 'Update Bank Information' and contains a 'Bank Information' section with a text block and a form. The form has six fields: Bank Type (US), Account Type (Checking), Bank Name (Chase), Routing Number (103286904), Account Number (80215649610), and Name on Account (Julian Burg). At the bottom of the form are four buttons: 'Save', 'Save & Finish Later', 'Save and Continue', and 'Cancel'. A footer contains various links and a copyright notice.

**1** Enter information

**2** Click **Save and Continue**



## Step 6: Documentation Tab

Click **Save and Continue**.

*Note: Typically, no additional documents will be required for this transaction.*

Ohio Department of Education  
Ohio Department of Job and Family Services

Dashboard Messages Documents Add System User

### Update Bank Information

Update Bank Documentation Review & Sign

Documentation No documents are required to submit this request

Save Save & Finish Later **Save and Continue** Cancel

Click **Save and Continue**

CCIDS Provider Portal Early Childhood Ohio OCCRRRA Ohio.Gov Non-Discrimination Statement Privacy Statement FAQs Contact

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## Step 7: Review and Sign

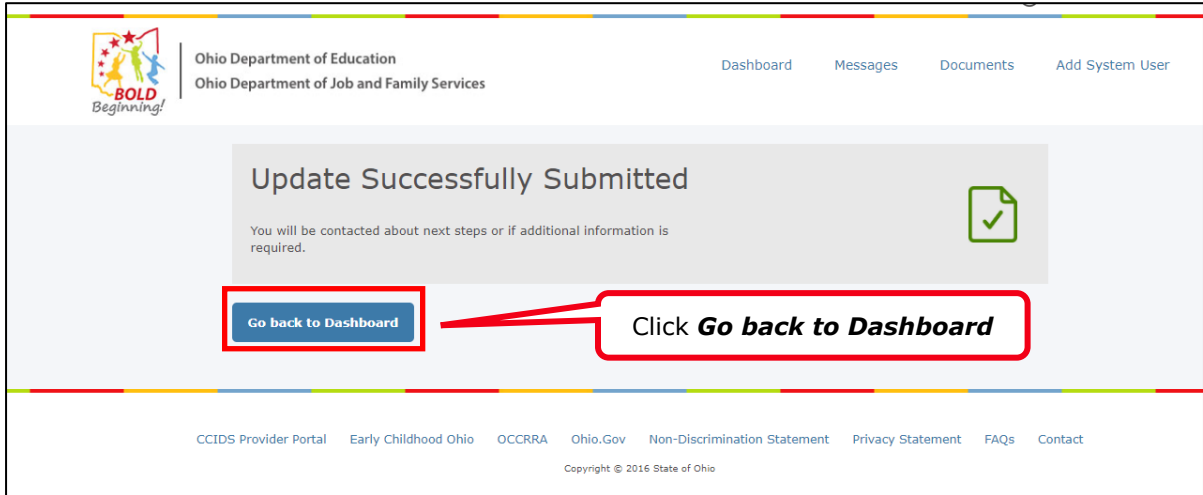
- 1) Check the **Electronic Signature** box if you agree with statement.
- 2) Enter your full name.
- 3) Click **Submit**.

The screenshot shows the 'Update Bank Information' page. At the top, there is a progress bar with three steps: 'Update Bank' (completed), 'Documentation' (completed), and 'Review & Sign' (current step). The 'Review & Sign' section includes a 'Review' section with a 'Check box' annotation (1) pointing to a checkbox. Below this is the 'Electronic Signature' section, which contains a text box for a certification statement, a warning about the penalty of perjury, and a 'Name' field with the value 'Patricia Bechstein'. There is also a 'Submission Date' field with the value '11/25/2020, 4:14 PM' and an 'Enter Your Name' field. At the bottom, there are two buttons: 'Save & Finish Later' and 'Submit', with an annotation (3) pointing to the 'Submit' button. The footer contains links for 'CCIDS Provider Portal', 'Early Childhood Ohio', 'OCCRRRA', 'Ohio.Gov', 'Non-Discrimination Statement', 'Privacy Statement', 'FAQs', and 'Contact', along with a copyright notice for 2016 State of Ohio.



## Step 8: Return to Dashboard

Click **Go back to Dashboard**



The process of Updating Banking Information in the OCLQS Portal is complete.