



C-FIRST! Training

Case Management Learner Guide

Tennessee Department of Children's Services



Case Management Course Learner Agenda

Day 1

Introduction

Lesson	Task
Let's Dive In	• Introduction to the Course • Case Scenario: The Carter Family • What to Expect • Your Role • Course Objectives • Icons Used Throughout the Course

Module 1: General Navigation

Lesson	Task
Lesson 1: Logging into C-FIRST! and Understanding User Roles	• Task 1: Login to C-FIRST! • Task 2: Review the Homepage Components
Lesson 2: Navigating the Homepage and Global Menu	• Task 1: Navigate Using the Global Menu • Task 2: Access Cases from Homepage Components • Task 3: Use Related List Quick Links • Task 4: Navigate to the Case Summary Tab
Lesson 3: Using Search Functions for Cases and Persons	• Task 1: Search for an Existing Person • Task 2: Enter a New Person if No Search Result is Found • Task 3: Switch Between List Views
Lesson 4: Understanding Notifications	• Task 1: Access Your Task Notifications • Task 2: Switch Between Task Views • Task 3: Navigate from Task to Related Case • Task 4: Mark Tasks as Complete • Task 5: Review Approval Notifications

Lesson	Task
Lesson 5: Managing Your User Profile and Preferences	- Task 1: Pin Default List Views - Task 2: Use List View Settings
Lesson 6: Manual Task Creation	- Task 1: Navigate to the Today's Tasks List View - Task 2: Create a Manual Task Record

Module 2: Person Management

Lesson	Task
Lesson 1: Managing Case Persons	- Task 1: Add a New Person to a Case - Task 2: Complete Case Person Details Fields - Task 3: Document a Visitation Waiver for a Case Person - Task 4: Review Person Involvement History
Lesson 2: Conducting Diligent Searches	- Task 1: Access the Diligent Search List View from a Case - Task 2: Create a New Diligent Search Record - Task 3: Add Children to a Diligent Search Record
Lesson 3: Children Related List	- Task 1: Navigate to the Children Related List - Task 2: Create a New Children Record
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Lesson 5: Persons Involved on Case Conferences	- Task 1: Navigate to the Persons Involved Related List View on a Case Conference - Task 2: Add a New Person Involved Record to a Case Conference - Task 3: Review the Person Involved Detail Screen

Morning Break

Module 3: Court & Legal

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Lesson 1: Managing Petitions	- Task 1: Create a Termination of Parental Rights (TPR) Petition - Task 2: Complete a TPR Petition - Task 3: Create an Adoption Petition - Task 4: Save an Adoption Petition and Review Defaults
Lesson 2: Court Orders and Hearings	- Task 1: Access the Court Orders and Hearings List View - Task 2: Create D/N, Unruly, and Other Court Order/Hearing - Task 3: Enter Custody and Reasonable Efforts Details on a Court Order/Hearing
Lesson 3: Custody Records and Legal Status	- Task 1: Navigate to the Custody Related List from a Case Person - Task 2: Create a Custody Record for a Child - Task 3: Review Custody Record Validation Rules and Read-Only Fields - Task 4: Navigate to the Legal Statuses Related List from a Case Person - Task 5: Create a Legal Status Record for a Child
Lesson 4: Legal Timelines	- Task 1: Access the Legal Timeline - Task 2: Review Legal Events on the Legal Timeline
Lesson 5: Predisposition/Order of Reference	Task 1: Add Predisposition/Order of Reference

Lunch

Module 4: Program & Task Management

Lesson	Task
Lesson 1: Programs List View	- Task 1: Access the Programs Related List on a Treatment Case - Task 2: Create an FSS Program Record
Lesson 2: Custodial Juvenile Justice Program	- Task 1: Navigate to the Programs Related List on a Treatment Case - Task 2: Create a Custodial JJ Program Record - Task 3: Activate a JJ Program Record - Task 4: Close a JJ Program Record
Lesson 3: Non-Custodial Juvenile Justice Program	- Task 1: Navigate to the Programs Related List on a Treatment Case - Task 2: Create a Non-Custodial JJ Program Record - Task 3: Activate a Non-Custodial JJ Program Record - Task 4: Close a Non-Custodial JJ Program Record
Lesson 4: Create and Manage Programs	- Task 1: Access the Programs Related List on a Treatment Case - Task 2: Create a New Program Record - Task 3: Activate a Program Record
Lesson 5: Case Related Activities	Task 1: Review the Case Related Activities List View
Lesson 6: Programs in Independent Living	- Task 1: Access the Programs Related List on a Treatment Case - Task 2: Create a New Independent Living Program Record - Task 3: Activate the Independent Living Program Record - Task 4: Review Automated task for Independent Living Programs

Lesson	Task
Lesson 7: Service Requests	• Task 1: Navigate to the Service Requests Related List • Task 2: Create a New Service Requests Record • Task 3: Submit the Service Requests and Review the Result • Task 4: Review and Select Provider for Service • Task 5: Service Log

Afternoon Break

Module 5: Case Documentation & Conferencing

Lesson	Task
Lesson 1: Case Documentation	• Task 1: Access the Case Documentation List View from a Case Record • Task 2: Create a New Case Documentation Record • Task 3: Add Persons and Collaterals to a Case Documentation Record • Task 4: Access Case Documentation from a Person Record
Lesson 2: Document Assessments	• Task 1: Complete Behavior Management Assessment & Crisis Plan • Task 2: Conduct a Juvenile Justice Community Risk Tool • Task 3: Conduct a Child and Adolescent Needs and Strengths (CANS) Assessment • Task 4: Conduct a FAST Assessment • Task 5: Assessments Related Lists
Lesson 3: Child and Family Team Meeting (CFTM)	• Task 1: Access the Child and Family Team Meeting List View • Task 2: Create a New Child and Family Team Meeting Record • Task 3: Document Meeting Details and Participant Agreements • Task 4: Complete a Child and Family Team Meeting Record

Lesson	Task
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Wrap-Up Day 1

Module 6: Plan Development & Management

Lesson	Task
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Lesson 3: Custodial Permanency Plans	- Task 1: Access the Plans List View from a Case Record - Task 2: Create a New Custodial Permanency Plan Record - Task 3: Enter Custodial Permanency Plan Details - Task 4: Clone a Completed Custodial Permanency Plan
Lesson 4: Child Safety Plans	- Task 1: Navigate to the Plans List View from a Case Record - Task 2: Create a New Child Safety Plan Record - Task 3: Enter Behaviors and Responsibility Areas on a Child Safety Plan - Task 4: Review Child Safety Plan Related Lists
Lesson 5: Unsafe Behaviors and Triggers and Support	- Task 1: Create an Unsafe Behaviors and Triggers Record on a Plan - Task 2: Review an Unsafe Behaviors and Triggers Record - Task 3: Create a Support Record on a Plan - Task 4: Add Persons and Collaterals to a Support Record

Lesson	Task
Lesson 6: Plan Responsibilities	- Task 1: Navigate to the Responsibilities List View - Task 2: Create a New Responsibility Record - Task 3: Review a Responsibility Detail Record - Task 4: Edit or Delete Responsibility from the List View
Lesson 7: Navigating the Approval Process	- Task 1: Submit a Record for Approval - Task 2: Review the Approval History

Morning Break (10:25-10:40 AM)

Module 7: QRTP Eligibility

Lesson	Task
Lesson 1: Review CANS Assessment	Task 1: Verify the CANS Assessment is Entered
Lesson 2: Create the Child and Family Team Meeting	Task 1: Create the CFTM Record
Lesson 3: Document Court Approval	Document Court Order Hearing Approval

Module 8: Placement Management

Lesson	Task
Lesson 1: Understanding Placement Types	Task 1: Navigate to the Custodial Placements List View from a Case
Lesson 2: Placement Changes and History	- Task 1: Create a Placement Request - Task 2: Create a Placement Change Notification Record - Task 3: Complete Placement Change Notification Fields - Task 4: Review Custodial Placement History - Task 5: View the Placement Summary
Lesson 3: Non-Custodial Placement	Task 1: Create Non-Custodial Placement

Module 9: ICPC Requests

Lesson	Task
Lesson 1: Sending ICPC Requests	- Task 1: Access the IC Request List View from a Case - Task 2: Enter General Request Information - Task 3: Enter Service Request Information - Task 4: Complete the Home Study and Financial/Medical Plan Information - Task 5: Submit the ICPC Request Send for Approval
Lesson 2: Receiving and Reviewing Requests	- Task 1: Navigate to the IC Request List View - Task 2: Create a New ICPC IC Request Receive Record - Task 3: Review Auto Populated Fields and Submit the ICPC IC Request Receive - Task 4: Assign a Home Study Owner and Update the Request Status - Task 5: Complete the Preliminary Home Study Response - Task 6: Complete the Final Home Study Response
Lesson 3: Managing Transmittals	- Task 1: Review the Transmittals List View - Task 2: Create a New Transmittal - Task 3: Complete the Case Status Update Section - Task 4: Send a Transmittal to NEICE - Task 5: Review an Unsuccessful NEICE Transaction - Task 6: Review a Received Transmittal

Lunch

Module 9: ICPC Requests Continued

Lesson	Task
Lesson 4: ICPC Case Administration	- Task 1: Review the ICPC IC Admin Case Send - Task 2: Review the Request Tab and Open the ICPC IC Admin Case Send - Task 3: Review the Case After the Home Study Request Transmittal Is Sent

Lesson	Task
	- Task 4: Record the Home Study Response on the ICPC IC Admin Case Send - Task 5: Review the ICPC IC Admin Case Receive - Task 6: Update the ICPC IC Admin Case Receive for a Non-NEICE State
Lesson 5: ICPC Progress Reports	- Task 1: Access the Progress Reports List View - Task 2: Create a New Progress Report - Task 3: Document Current Placement Status and Progress Assessment - Task 4: Add a Recommendation and Submit the Progress Report for Approval

Module 10: Incident Reporting

Lesson	Task
Lesson 1: Create an Incident Report	- Task 1: View Responders Incident Reports - Task 2: Create a New Incident Report from a Provider Record - Task 3: Add Youth Details to the Incident Report - Task 4: Enter Event Details and Complete the Incident Report
Lesson 2: Incident Report Related Lists	- Task 1: Add an Other Person Involved to an Incident Report - Task 2: Add a Notification Detail to an Incident Report

Module 11: Document Management and Case Closure

Lesson	Task
Lesson 1: Generating Forms in C-FIRST!	- Task 1: Automatic Form Generation Process - Task 2: E-sign a Form - Task 3: Manual Form Generation Process
Lesson	Task
Lesson 2: Access and Manage Documents	- Task 1: Access the Attachments Tab on a Case Record - Task 2: Upload a Document Using Basic Upload

Lesson	Task
	• Task 3: Search for Documents on the Attachments Tab • Task 4: Download Documents from the Attachments Tab • Task 5: View and Edit an Attachment Record • Task 6: Generate Case Print • Task 7: Case Closure

Afternoon Break

Module 12: Youth Portal

Lesson	Task
Lesson 1: Enable Youth Portal Access	• Task 1: Youth Portal Access Overview • Task 2: Upload Documents to the Person Record for the Youth to Access
Lesson 2: Review Documents Uploaded by Youth	• Task 1: Locate a Youth-Uploaded Document on the Person Record
Lesson 3: Verify NYTD Survey Completion	• Task 1: NYTD Survey Notifications • Task 2: Verify NYTD Survey Completion in the Worker Portal

Wrap-Up Day 2

Module 13: Supervisor-Specific Functions

Lesson	Task
Lesson 1: Supervisor Dashboard and Widgets	- Task 1: Access the Case Management Homepage and Identify Supervisor Widgets - Task 2: Review the Items to Approve Widget - Task 3: Approve an Item from the Items to Approve Widget - Task 4: Reject an Item from the Items to Approve Widget - Task 5: Reassign an Approval Request from the Items to Approve Widget - Task 6: Review the My Workers Case Load Widget - Task 7: Review the My Workers Tasks Widget - Task 8: Review Pending FSS Programs from the Programs Tab
Lesson 2: Approvals and QA Reviews	- Task 1: Approve a Submitted Record - Task 2: Reject a Submitted Record - Task 3: Reassign a Submitted Record to Another User - Task 4: Review the Approval History for a Record
Lesson 3: Managing Case Closures and Overrides	- Task 1: Edit a Completed Permanency Plan Record - Task 2: Abridge a Child and Family Team Meeting - Task 3: Close a Treatment Case - Task 4: Add Documentation to a Closed Case - Task 5: Review Read-Only Restrictions and Error Messages

Morning Break

Module 13: Supervisor-Specific Functions

Lesson	Task
Lesson 4: Running Reports	- Task 1: Run the My Workers Case Load Report - Task 2: Run the My Workers Tasks Report

Lesson	Task
	Task 3: Run the Next Court Hearing Due Report

Lunch

Module 14: Supervisor-Specific Functions Continued

Lesson	Task
Lesson 5: Access Tableau	- Task 1: Accessing Tableau Reports - Task 2: Filtering Reports - Task 3: Downloading Reports
Lesson 6: Case Process Reviews (CPR)	- Task 1: Case Process Reviews (CPRs) Overview - Glossary

Wrap-Up Day 3

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Introduction

Welcome to the State of Tennessee Department of Children's Services (DCS) C-FIRST! **Case Management Course**. We are excited to have you here with us! As you may have learned through receiving Change Champion materials, monthly communications, and completing the **C-FIRST! For All** web-based training, we are moving to an integrated and modernized case management platform. C-FIRST! provides comprehensive and streamlined ways to manage intake, investigations, safety decisions, case and person data, placement, provider, and eligibility information.

This course provides practical end-to-end learnings related to performing case and person searches, updating collaterals, court and legal information, service referrals, case documentation, and other case management topics. Before we dive into the details of the course we are going to recap some general navigation terms and level set on what to expect from today's training.

Let's Dive In

This course covers case management in C-FIRST!. The Treatment Case is the main record for all children and families, regardless of program. From the Treatment Case, you document contacts, complete assessments, create permanency plans, manage meetings, placements, and court activity. When a child's case moves towards permanency, the Treatment Case links to the Permanency Case while maintaining the family's central record.

See below for information on the end-to-end lifecycle of a case.

Phase 1: Case Creation

A Treatment Case enters the system through one of three paths:

1. **Investigation Disposition:**

- The most common path is Investigation Disposition. When an Investigation concludes and the Final Disposition is set to *Refer to Treatment*, the system automatically creates a Treatment Case in case where a Treatment Case is not already active. During this process, the system copies all active Case Persons,

Court Orders, and Petitions from the Investigation into the new case.

- If there is an open Treatment Case for the family, the Investigation can be linked to the open Treatment Case.

2. **From a Person Record:**

- The second path begins on a Person Record. You navigate to the child's Person Record, open the **Cases** Related List, click **New Case** and select *Treatment* as the case type. This process is for cases that do not go through the Investigations process. As an example, this includes the Juvenile Justice, Family Crisis Intervention Program, and Order of Reference programs.
- The system populates the **Case Name** with the child's last name and first name. Because no Investigation exists in this scenario, no records carry over automatically.

3. **From the Cases tab:** The third path starts from the Cases tab, where you click "New Case" and create the record from scratch.

Phase 2: Case Setup and Assignment

When someone is added as an Assigned User to an open case, C-FIRST! sends a bell notification so they know work has been assigned to them. All open cases must always be assigned to a staff person or unit.

Program creation is the most important step after case creation. You create a Program record for each child on the case and select the appropriate program type:

- Custodial DNN/Unruly
- Custodial JJ
- FCIP
- FSS
- ICJ Incoming
- Independent Living
- Non-Custodial JJ

- Predisposition/Order of Reference
- RCP (Non-Stipend)
- RCP (Stipend)

Note: Program type is manually selected by the user. A program type is only worklisted if the case is coming from an Investigation where a specific program type was recommended.



System Tip!

- Worklisting refers to the auto creation of a linked record based on certain triggers with the record status as *Worklisted*. This feature in C-FIRST! enables users to avoid manually creating certain records and editing system-created ones, instead.
- FSS programs are governed by a specific workflow: upon entry, each program is assigned a *Pending* status and placed in a supervisor review queue. A Child Program Supervisor is responsible for reviewing the program, designating a Case Manager, and updating the status to *Active* which initiates the program tasks.
- For cases originating from an Investigation, active Case Persons are pre-populated; however, additional individuals may still need to be added. For manually created cases, all case persons must be entered through the **Persons** Related List.
- The system automatically assesses and displays pertinent case-level flags. For example, an IDD flag appears when any case person is identified as *Intellectually or Developmentally Disabled*; a Safe Haven flag is shown if a Safe Haven person is associated with the case; and a Sealed Person Present flag is displayed if any case person has the Seal Case Person field marked as *Yes*

Phase 3: Ongoing Case Work

This stage involves ongoing, reoccurring tasks carried out throughout the duration of the case. Each type of activity features its own Related List within the Treatment Case.

Once a Treatment Case is active, all related management activities are contained within it, with no sharing back to the Investigation. Although the Investigation remains accessible via the **Associated Cases** Related List for reference, both processes operate independently.

Case Documentation

You create Case Documentation records to capture child contacts, visits, and other ongoing interactions. Each record includes a **Duration of Contact** field and a **Persons Involved** section that displays each person's case role (e.g., biological father, foster parent). The **Staff Involved** section lets you add workers who were present during the contact, such as a Team Leader or colleague. The different record types include:

- Absconder Unit Investigation
- Caregiver Contact
- Child Contact
- Child Visit with Other Family Member/Kin
- Closing Summary
- Electronic Monitoring Unit Summary
- Foster Parent Contact
- FSW Electronic Monitoring Alert Response
- Law Enforcement Contact
- Monthly Case Summary
- Notation
- Opening Case Summary
- Other Family Member/Kin Contact
- Parent-Child Contact
- Parent-Child Visit
- Parent Contact
- Private Provider/DCS Contact
- School Contact
- Sibling Visit
- Supporting Contact
- Transport
- C-FIRST! applies different validation requirements depending on whether the record is a contact or a notation.

The system tracks how frequently documentation occurs; if no new entry is made in 90 days, the Supervisor receives a bell notification to highlight inactivity.

Child and Family Team Meetings (CFTMs)

These meetings are documented in the case to note discussions about the child's needs and future support plans. The different meeting types include:

- CPS Initial Non Custody
- CPS Pre Custodial
- CPS Progress Review of Family Permanency Plan
- CPS Revision of Family Permanency Plan
- CPS Transition Non Custody
- Custodial Permanency Plan Revision
- Discharge/Exit Bright Futures
- Discharge/Exit Custody
- Discharge into Young Adulthood
- EFCS - Initial Bright Futures
- EFCS - Permanency Plan Revision
- EFCS - Progress Review
- FSS/FCIP Pre Custodial
- Individual Recruitment Planning Quarterly Review CFTM
- Initial Custody (JJ)
- Initial Custody (SS)
- Initial Full Guardianship CFTM
- JJ- Discharge from Probation/Aftercare
- JJ Initial Non Custody Permanency Plan
- JJ- Initial Permanency Plan (Custody)
- JJ Permanency Plan Revision (Custody)
- JJ- Progress Review of Non-Custody/ Quarterly Review
- JJ- Release to Aftercare
- Non-Custodial Initial Family Permanency Plan CFTM
- Non-Custodial Permanency Plan Revision
- Planned Placement Stability
- Progress Review Custody
- Special Called CFTM
- SS Initial Permanency Plan (Custody)
- SS Permanency Plan Revision
- Supported Decision Making
- Transition Plan
- Transition to Adulthood
- Unplanned Placement Stability
- YDC- Individual Program Plan/ Permanency Plan (Custody)

- YDC- Plan Revision (IPP)
- YDC Program Transfer
- YDC- Quarterly IPP Review

Assessments

There are several assessment types that may be completed as needed. These assessments include:

- Behavioral Management Assessment and Crisis Plan
- CANS
- FAST
- Independent Living
- Juvenile Justice Community Risk Tool
- Relative/Kinship Home Study
- Safe Sleep

Plans

Custodial Permanency Plans, created within the Treatment Case, record strengths, goals, family backgrounds, and steps toward achieving permanency.

Both custodial and non-custodial plans follow specific workflows but are managed from the same case.

The other plans include:

- Child Safety Plan
- Individual Recruitment Plan
- Non-Custodial Permanency Plan
- YDC Safety Plan

Case Conferences

There are two varieties: Supporting Case Conferences, which are discussions with other professionals both internally and externally that are geared toward unique characteristics or needs of the child and/or family. Supervisor/Worker Treatment Case Conferences, on the other hand, capture formal reviews between case managers and supervisors. At least one Supervisor/Worker conference must occur within 30 days before closing a case.

Diligent Search

Ongoing efforts to find relatives or permanent connections are conducted and logged through the Diligent Search Related List. Completing at least one Diligent Search Effort is mandatory before closing the case. The methods include:

- Attempted Face to Face
- Attempted Phone
- Attempted Visit to Potential Home Address
- CLEAR Search
- Contact Courts/Clerk
- Contacting Agency Outside DCS
- Correspondence
- Criminal History Checks
- Email
- Government Webpages/Search Engine
- Interview Child/Youth
- Interview Parents
- Interview Relatives/Kin
- Mailing Notification Letter
- Phone Call
- Prison/Jail Search
- Putative Father Registry
- Received Response from Potential Relative
- Records Search
- Reviewing Previous DCS History
- Social Media
- Text Message
- Web Searches
- Other

Service Referrals

Service referrals are generated as necessary, and the case maintains a comprehensive list showing all referrals—both current and completed—for easy tracking.

Placements

In custodial programs, placement activities such as Placement Requests, Change Notifications, Primary and Secondary Placements, and Trial Home Visits are managed directly through the case.

In Non-Custodial programs, placements show where to locate the child. They could be with a relative or kin, in a residential treatment facility, run away, or at home with family.

Court and Legal

All petitions and motions (covering Adoption, TPR and D/N, Unruly, and Other Petition/Motion) and hearings and court orders (covering Adoption, TPR, Juvenile Justice and ICJ Court Order, Subsidized Permanent Guardianship Hearing and Court Order, and D/N, Unruly, and Other Hearing/Court Order) are tracked on the case using their designated Related Lists.

Tasks

Some Tasks are systematically worklisted depending on the program, age triggers, and timeline requirements for things like assessments and plan renewals. Users can also manually add tasks for items outside system generation. Both worklisted and manual tasks are consolidated into a single task list within the case.

Phase 4: Program Changes and Transitions

Intervention level of Programs within a Treatment Case may change over time without needing to open a new case. For instance, if you want to adjust an **FSS Intervention Level** from *Intensive* to *Moderate*, you must complete a FAST Assessment on the Treatment Case for the involved individual; the system will not allow this change without a completed assessment.

Each program can be closed independently. Closing a JJ program does not require closing other programs within the same case. When

ending a program, you must enter a **Program End Date** and provide a **Program Closure Summary**.

If reunification is no longer the child's goal, you initiate a **Permanency Committee Referral** from the Treatment Case. This referral creates a Permanency Case, where a Permanency Specialist manages adoption or guardianship. The original Treatment Case remains open while the Permanency Case is ongoing.

Phase 5: Closure Recommendation

Once all case work is completed, the closure process begins with two distinct steps: first, the worker provides a recommendation; then, the Supervisor makes the final determination. To start this process, navigate to the Closure Recommendation section located on the Case Information tab and complete the Closure Type field.

The system enforces seven specific conditions before allowing you to save the closure recommendation:

1. All custodial placements must be discharged or transferred.
Note: For non-custodial placements, a case may be closed even when the child remains in that placement.
2. A Supervisor/Worker Treatment Case Conference must have taken place within the past 30 days.
3. Every Court Order associated with the case must be marked as *Completed*.
4. There must be no active programs listed in the Programs Related List.
5. All Case Documentation must be marked as *Completed*.
6. At least one Diligent Search Effort must be completed.
7. Before marking the case status as *Completed*, the **Closure Recommendation** section of the Case Details screen must be completed. This includes updating the **Closure Type** and the **Notes**.

If any of these requirements are not met, the system will display an error message and prevent saving the recommendation. When all criteria are met and you successfully save the closure recommendation, the Disposition Status is set to *Pending* and a Disposition Task is automatically generated for your supervisor to review.

Phase 6: Closure Disposition

The supervisor opens the Disposition Task, reviews your Closure Recommendation in the Treatment Case, and completes four fields: **Closure Type**, **Review Date**, **Notes**, and **Final Case Disposition**. Only users with specific roles (Child Program Supervisor, Regional Director/Executive Director/Assistant Commissioner, or Business Administrator) can see and select *Complete Disposition*.

When clicked, this button triggers validations like those in Phase 5. If all validations succeed, the system sets **Case Status** to *Closed*, **Disposition Status** to *Completed*, updates **Today's Case Close Date**, and marks all outstanding tasks as *Abridged*.

Phase 7: Post-Closure

Once a case is closed, most actions are restricted. Supervisors, however, can still add Case Documentation, Attachments, and Court Order/Hearing records; all other entries are blocked. Non-supervisory users have read-only access to the record. Case Managers are able to update **Closure Recommendation** information, while a supervisor has the ability to access the **Case Disposition** information for cases.

Investigation Workers can review closed cases if new allegations arise about known individuals. The **Case Summary** tab remains visible, showing key details and the complete case history.

Abridged status is separate from *Closed*; setting it requires an Abridge Reason and Notes. Abridged Cases follow the same read-only rules as closed Cases for non-supervisory users.

Case Scenario: The Carter Family

The Carter household came to the attention of the Tennessee Department of Children's Services (DCS) through an investigation initiated by a report from Maple Grove Elementary School regarding 10-year-old Jaylen Carter. Teachers and school counselors documented visible signs of physical abuse, chronic absences, and reports of escalating domestic violence in the home. An investigation concluded that the children were unsafe in the home due to their mother Denise Carter's untreated alcohol use disorder, a pattern of domestic violence with her live-in partner Marcus Webb, and inadequate supervision.

Following the investigation, Denise Carter's parental rights over all three of her children were ultimately terminated. In addition to Jaylen (age 10) and Aaliyah (age 7), there is a third child, Michael Carter (age 16), Denise's eldest, who was previously removed from the home two years prior and has been in DCS custody ever since. Michael is now approaching adulthood and is the primary focus of the Independent Living program. Their maternal grandmother, Dorothy Carter, stepped forward as the primary placement resource for all three children and later pursued adoption of Jaylen and Aaliyah. Michael's case follows a separate but connected path focused on transition-to-adulthood planning. Dorothy's adult son and the children's uncle Kevin Carter and his wife Sandra Carter also become involved as collateral supports and serve as key mentors and resources throughout the case.

Carter Family Members

Name	Role	Description
Denise Carter	Mother	Primary parent; history of alcohol use disorder and domestic violence; fails to complete permanency plan; parental rights terminated
Michael Carter	Child (Age 16)	Eldest child; previously removed from home 2 years prior; already in DCS custody; primary focus of Independent Living programming; also adjudicated delinquent — subject of Custodial JJ program; aging out of care; placed with Dorothy Carter
Jaylen Carter	Child (Age 10)	Middle child; subject of current intake; placed with maternal grandmother; develops behavioral challenges; subject of Non-Custodial JJ (probation/diversion) program at age 13
Aaliyah Carter	Child (Age 7)	Youngest child; also removed from home; placed with Dorothy Carter; subject of adoption petition; focus remains on stability and permanency — no JJ involvement
Dorothy Carter	Maternal Grandmother	Primary placement resource for both children; active collateral and support; pursues adoption after TPR
Kevin Carter	Uncle (Dorothy's son)	Adult son of Dorothy; serves as collateral contact; involved in Case Conferences; assists with transportation and mentorship for Jaylen
Sandra Carter	Aunt (Kevin's wife)	Provides supplementary support for the children; involved in CFTM meetings; assists with school activities and medical appointments

Name	Role	Description
Marcus Webb	Denise's Partner	Live-in partner of Denise; documented perpetrator of domestic violence; subject of court no-contact order with children
Unknown (Bio Father)	Absent Father	Biological father of Jaylen and Aaliyah; identity unconfirmed; subject of diligent search efforts including Putative Father Registry

What to Expect

Throughout the course, you will be guided through the case management process as it unfolds in C-FIRST!. You will be tasked with:

1. Navigating the C-FIRST! Homepage, locating cases through list views, and using the Treatment Case dashboard to access related lists and case records.
2. Managing person records on the case, including adding and editing case persons, conducting diligent searches for relatives and kin, and maintaining collateral contacts.
3. Creating and managing programs and tasks on the Treatment Case, including assigning program types and monitoring auto generated worklist items.
4. Documenting case activities such as child contacts, family visits, and collateral consultations, and recording the persons, staff, and children involved in each contact.
5. Facilitating and documenting Child and Family Team Meetings (CFTMs), including adding participants, recording agreements and next steps, and linking children and recipients.
6. Developing safety plans, permanency plans, and service referrals, and submitting them through the supervisor approval workflow.
7. Filing petitions, creating court orders, documenting custody records and legal statuses, and tracking the legal timeline.
8. Creating placement requests, managing custodial placements, and processing placement change notifications.
9. Entering Case Services and completing incident reports, Case Process Reviews (CPRs), and QRTP eligibility evaluations as required by the case.

10. Generating forms, uploading and managing documents, and enabling Youth Portal access for eligible youth.

Your Role

As the case progresses, you will be responsible for maintaining accurate case records, tracking service participation, completing required assessments on schedule, and preparing recommendations for ongoing support. The scenario emphasizes teamwork, accountability, and the importance of clear, timely documentation. You will work closely with both the Carter family and external partners to address risks and support positive outcomes.

You will also be asked to complete tasks in this course that may not be part of your day-to-day role. This is because we have a set amount of time with you today and want to show you processes in C-FIRST! are at a holistic level.

C-FIRST! allows supervisors to assign staff to one primary role and multiple secondary roles.

Course Objectives

Throughout this course, you will practice each skill hands-on in a C-FIRST! training environment using realistic Tennessee family scenarios. You will walk through the full lifecycle of a Treatment Case: creating the case and assigning programs, adding case persons, completing assessments and plans, documenting ongoing work, and closing the case through the supervisor disposition process. By the end of this course, you will be able to navigate the C-FIRST! case management screens, complete the tasks your role requires, and understand how your work connects to the broader child welfare process.

Icons Used Throughout the Course

The following icons are used throughout the Guide. Refer to the table below to understand what they mean.

Icon	Description
	System Tip! This icon highlights technical guidance for navigating and using specific features within C-FIRST!.
	Process Tip! This icon provides workflow guidance and important operational notes that help workers apply DCS policies and procedures to C-FIRST!.
	Win! This icon identifies new system capabilities that automate manual tasks or reduce the number of steps required to complete your work.

Module 1: General Navigation

The module covers the C-FIRST! search functionality for locating cases and person records, switching between list views, and managing the alerts and notifications that drive daily workflow. Users will practice accessing task notifications, switching between task views such as **All Tasks**, **Open Tasks**, **Overdue Tasks**, and **Today's Tasks**, navigating from a task to its related case record, and marking tasks as complete. The module concludes with personalizing the user experience by pinning default list views and adjusting list view settings.

After completion of the module, you will be able to:

- Login to C-FIRST! and identify Homepage components and user role permissions
- Navigate between tabs, cases, and records using the global menu and Related List Quick Links
- Search for cases and person records using multiple criteria and list views
- Access, filter, and manage task notifications across different task views
- Navigate from a task notification to its related case record
- Mark tasks as complete and review approval notifications
- Pin default list views and customize Homepage preferences

Lesson 1: Logging into C-FIRST! and Understanding User Roles

Before you can begin working on the Carter family case, you must successfully log in to C-FIRST! and understand how your assigned role determines what you can see and do in C-FIRST. Your role grants you specific permissions to view cases, create records, and submit work for supervisory approval.

Learning Objectives

- Login to the C-FIRST! application using valid credentials
- Identify the components displayed on the Homepage
- Understand how user roles determine system access and permissions
- Locate previous login details for security verification

Task 1: Login to C-FIRST!

You have been assigned to the Carter family Treatment Case (Treatment Case refers to a “Family Case” in T-FACTS). The intake was received from Maple Grove Elementary regarding 10-year-old Jaylen Carter. An investigation was concluded and a Treatment Case has been started. Before you can review the case details, you must login to C-FIRST! with the correct credentials.

1. Open your web browser and navigate to the C-FIRST! application URL provided by your administrator. The C-FIRST! log in screen displays.
2. Log in as the **Case Manager**. Click the **Username** field and enter your assigned DCS username.
3. In the **Password** field, enter *your secure password*.
4. Click **Log In**. C-FIRST! validates your credentials and displays the **Home** tab.
5. Verify that you have arrived at the **Homepage**.

Task 2: Review the Homepage Components

Now that you are logged in as a Case Manager, familiarize yourself with the **Homepage** layout. The **Homepage** displays the following information:

- **Today's Tasks:** This widget displays a list of all the tasks that are assigned to the worker and when it is due. The subject and the associated record ID are displayed. The arrow in the top right corner of the User Tasks widget displays Today's, My Tasks, All Overdue, Completed within Last 7 days and Delegated Tasks views. The View All button allows users to view all the tasks with due dates equal to today.
- **My Cases:** This widget provides details about the cases assigned to the logged-in user and associated information like Case ID, Case Name, Case Type, Assignment Type, and Assigned Date.
- **My Programs:** This widget displays a list of active programs (assigned to the worker) and associated information like Program ID, Child Name, Program Name, Program Status, and Supervisor.
- **Next Court Hearing Due:** This widget on the Homepage provides details about the next court hearings assigned to the Assigned Attorney. This widget is not used by Placement staff.

Note: Workers may see additional dashboards based on their roles.

1. In the C-FIRST! Homepage Dashboard, the users have access to the following features:
 - **Navigation Bar:** This allows the users to switch between different tabs for major system functions.
 - **Global Search Bar:** This search bar is located at the top of the screen that enables users to search for records across multiple objects, including Intake records, cases, and people across C-FIRST!.
 - **Add Favorite Icon:** This is used to bookmark or add favorite screens, for users to jump to or view the screens.
 - **Global Actions Icon:** This is used to create New Tasks, Events, Notes, Person or to log a call and email.
 - **Guidance Center:** This is a go-to resource for any help, and provides the users with relevant articles, built-in support to help users get the most out of the C-FIRST! platform.
 - **Notifications:** This alerts the users to new notifications or updates related to Intakes, Cases, Persons etc.
 - **View Profile Icon:** This displays the user's profile details, Settings, Username, Display Density, and Logout.
2. The **Home** tab drop-down lists the various tabs available to the login user's role. For case management, the **Person** and **Cases** tabs are most used.
3. Click the **Home** drop-down and select **Person**. The **Person** screen displays.
4. The **Person Recently Viewed** List View provides comprehensive details about the person records, including details such as the Name, PID, Gender, Date of Birth, Age, Custody Status, Race, and Ethnicity.
5. There are currently four list views apart from the Recently Viewed list view:
 - All Persons
 - Birthdays This Month
 - New This Week
 - Recently Viewed Person

6. Click the **push pin** icon to set the screen as a default list view.
7. Click the **Home** drop-down and select **Cases**. The **Cases** screen displays.
8. The **Cases Recently Viewed** List View captures comprehensive details about the Case Records created from various sources including details such as Case ID, Case Name, Case Type, Case Status, Case Open Date, Case Close Date, and County.
9. There are currently the following list views apart from the Recently Viewed list view:
 - Adoption Cases
 - All
 - Bright Futures Cases
 - ICPC IC Request Receive
 - Investigation
 - My Open Cases
 - Permanency Cases
 - Permanent Guardianship Cases
 - Recently Viewed (Pinned list)
 - Treatment Cases
 - IC Administrative - ICAMA Cases
 - IC Administrative - ICPC Cases
 - My Primary Assigned Cases
 - Safe Haven Cases
10. Click the **push pin** icon to set the screen as a default list view.
11. On the **Cases** list view screen, users can access the following elements:
 - **Search Bar:** The search bar enables users to search for Intake records, cases and people within the list displayed. The Search Bar only searches the first 200 records.
 - **List View Controls:** This icon allows users to create a new record, and to reset the column width.
 - **Select List Display:** There are three list displays, Table, Kanban, and Split View. This enables users to choose which custom list view to display.
 - **Refresh:** This allows the users to refresh the listed records on the page.



Process Tip!

Check your **Homepage** at the start of each workday to identify cases requiring immediate attention, such as the Carter case.

Lesson 2: Navigating the Homepage and Global Menu

Understanding the global menu structure and Homepage components confirms that you can locate required information related to the Treatment Case.

Learning Objectives

- Navigate between tabs using the global menu
- Access Case Records from Homepage components
- Use the Related List Quick Links section to navigate within a case
- Switch between different list views

Task 1: Navigate Using the Global Menu

The global menu in C-FIRST! provides access to all major system functions. You will use this menu to navigate to the **Cases** tab where you can locate the Carter family case details.

1. Locate the navigation bar at the top of the C-FIRST! screen. The navigation bar displays tabs for major system functions.
2. Click the **Home** tab in the navigation bar. C-FIRST! displays your **Homepage**.
3. Click the **Cases** tab in the navigation bar. C-FIRST! navigates to the **Cases List View**.
4. Observe that the **Cases List View** displays columns including:
 - Case ID
 - Case Name
 - Case Type
 - Case Status
 - Case Open Date
 - Case Close Date
 - County
5. Click the **Home** tab to return to your **Homepage**. C-FIRST! displays the **Homepage**.



System Tip!

The tabs you see in the navigation bar may vary based on your user role and permissions.

Task 2: Access Cases from Homepage Components

Your **Homepage** displays several components that provide direct access to your assigned cases. The Carter family case should display in your notifications since it was assigned to you.

1. On the **Homepage**, locate the **Today's Tasks** component. C-FIRST! displays a list of tasks with due dates matching today's date.
2. Click the **View All** hyperlink below the **Today's Tasks** component. C-FIRST! navigates to the **Tasks List View** displaying all your tasks.
3. Locate the assigned task.
4. Click the task record to open the **Task Details** screen. C-FIRST! displays the task information including the **Related To** field.
5. Click the **Related To** hyperlink on the task. C-FIRST! navigates to the **Case** screen. This is where you will add documents related to the case. Refer to Module 13 for more information on Document Management.



Process Tip!

Accessing cases through task notifications confirms that you are working on the most time-sensitive items first.

Task 3: Use Related List Quick Links

Once you are on the Carter family case record, the **Related List Quick Links** section provides rapid access to all related records such as persons, assessments, findings, and contacts.

1. On the **Case Details** screen for the case, locate the **Related List Quick Links** section.
2. Click the **Associated Cases** hyperlink in the **Related List Quick Links** section. C-FIRST! displays the list of cases associated with the case.
3. Click the **browser back** button or the **Case name** hyperlink to return to the **Case** screen.

4. Click the **Associated Intakes** hyperlink in the **Related List Quick Links** section. C-FIRST! displays the list of associated intakes to the case.
5. Click the **browser back** button to return to the **Case** screen.
6. Click the **Case Related Activities** hyperlink in the **Related List Quick Links** section. C-FIRST! displays all activities related to the case including details such as Subject, Due Date, Priority, Status, Assigned To, and Related To.
7. Click the **browser back** button or the **Case Name** hyperlink to return to the **Case** screen.

Note: You will learn about the other hyperlinks in the **Related List Quick Links** section later in the training.



System Tip!

The **Related List Quick Links** section provides the fastest way to navigate between different record types within a case. Use these links instead of scrolling through the entire case record.

Task 4: Navigate to the Case Summary Tab

Before managing the Carter case, you must review the Case Summary. This section contains required information about the case.

1. On the **Case** screen, locate the tab navigation area near the top of the case record.
2. Click the **Case Summary** tab. C-FIRST! displays the **Case Summary** section.
3. Review the case details including the AI-generated Case Summary at the top of the section, provider and person location, Case Persons, Court Details, Interactions, Placements, and Assessment Details.
4. Click the **browser back** button or **Case** hyperlink to return to the **Case** screen. C-FIRST! displays the **Case Records**.

Lesson 3: Using Search Functions for Cases and Persons

While working on the Carter family case, you will need to search for existing person records before adding new individuals to the case. C-FIRST! requires an exhaustive search to prevent duplicate records and confirm you have complete history on all case participants.

Learning Objectives

- Perform a person search using multiple search criteria
- Interpret search results and identify matching records
- Use the Cases List View to locate specific cases
- Apply filters and sorting to list views

Task 1: Search for an Existing Person

Before adding a new person to the case, you must search to determine if they already exist in C-FIRST!.

1. From the **Case** screen for the case, click the **Persons** hyperlink in the **Related List Quick Links** section. C-FIRST! displays the **Persons** screen.
2. Click **Search Case Person**. C-FIRST! opens the **Search for a Person** screen.
3. Click the **Last Name** field and enter *last name####*.
4. Click the **First Name** field and enter *first name*.
5. Click the **Search** button. C-FIRST! performs the search and displays results in the **Search Results** list.
6. Review the search results. If a matching record exists, C-FIRST! displays the person name, date of birth, and PID.

Task 2: Enter a New Person if No Search Result is Found

If your search returns no results, C-FIRST! will display a message indicating no matches were found. You will then need to add them as a new person in C-FIRST!.

Note: If the search returns no matches, C-FIRST! displays the message, "Exhaustive search has found no evidence of any matches in the database."

1. Click the **New Person** button. C-FIRST! opens the **New Person** form.
2. Click the **First Name** field and enter *first name*.
3. Click the **Last Name** field and enter *last name####*.
4. Click the **Date of Birth** field and enter *date of birth*.
5. Click the **Gender at Birth** drop-down and select *gender*. This includes:
 - Female
 - Male
6. Complete all other mandatory fields indicated by red asterisks.

7. Click **Save**. C-FIRST! saves the new person record and displays a confirmation message.
8. Click the **Generate PID** button. C-FIRST! assigns a unique Person Identifier.

Task 3: Switch Between List Views

C-FIRST! provides multiple pre-configured list views to help you organize your work. Understanding these views helps you access the information you need.

1. Click the **Cases** tab in the navigation bar. C-FIRST! displays the **Cases** list view.
2. Click the **drop-down arrow** icon next to the current view name. C-FIRST! displays the list of available views.
3. Select **All** from the drop-down. C-FIRST! displays all case records in C-FIRST! including:
 - Case ID
 - Case Name
 - Case Type
 - Case Status
 - Case Open Date
 - Case Close Date
 - County
4. Click the **drop-down arrow** icon and select *Treatment Cases*.
5. Click the **drop-down arrow** and select *Recently Viewed*.
6. Click the **Pin** icon (push pin) next to your preferred view. C-FIRST! sets this view as your default when accessing the **Cases** tab.

Lesson 4: Understanding Notifications

C-FIRST! uses tasks and notifications to alert you when action is required on your cases. For the Carter family Treatment Case, you will receive case assignment and approval notifications.

Learning Objectives

- Access task notifications
- Switch between task views
- Navigate from a task to its related case
- Mark tasks as complete
- Review approval notifications

Task 1: Access Your Task Notifications

When the Child Program Supervisor assigned the Carter family case to you, C-FIRST! created a task notification. You must access this notification to begin working on the case.

1. Click the **Home** tab in the navigation bar. C-FIRST! displays your **Homepage**.
2. Locate the **Today's Tasks** component on your **Homepage**. C-FIRST! displays tasks with due dates matching today's date and status of *Worklisted* or *Pending*.
3. Click **View All** below the **Today's Tasks** component. C-FIRST! navigates to the **Tasks List View**.
4. Review the **Today's Tasks List View** which displays columns for the following:
 - Subject
 - Name
 - Related To
 - Due Date
 - Assigned Alias
5. Locate the task assigned to you.



System Tip!

The **Today's Tasks** component only shows tasks due today. Use the **View All** link to see all your assigned tasks regardless of due date.

Task 2: Switch Between Task Views

C-FIRST! provides multiple task views to help you organize your workload. You can view all tasks, open tasks, overdue tasks, or completed tasks depending on your needs.

1. On the **Tasks** list view, click the **drop-down arrow** next to the current view name.
2. Click the **drop-down arrow** and select *My Tasks*.
3. Click the **drop-down arrow** and select *All Overdue*.
4. Click the **drop-down arrow** and select *Completed Within Last 7 Days*.
5. Click the **drop-down arrow** and select *Delegated Tasks*.
6. Click the **drop-down arrow** and select *Today*.
7. Click the **Select list Display** button (table icon) to change how tasks are displayed.



Process Tip!

Check the **Overdue Tasks** daily to confirm that no required deadlines have been missed.

Task 3: Navigate from Task to Related Case

Each task notification links to the related case record. This allows you to navigate from the notification to the case requiring action.

1. On the **Tasks** list view, click the required **Subject** for the Carter case. C-FIRST! opens the **Task** screen.
2. Locate the **Related To** field. This field displays the case associated with the task.
3. Click the **Related To** hyperlink. C-FIRST! navigates to the **Case Details** screen for the appropriate case type.
4. Review the case information to understand what action is required.
5. Click the **back browser** button to return to the **Task Details** screen. C-FIRST! displays the task record.



System Tip!

The **Related To** hyperlink on a task always links to the primary record requiring action. For Case-related tasks, this will be the Case ID hyperlink.

Task 4: Mark Tasks as Complete

After completing the required action for a task, you must update the task status to reflect completion. This removes the task from your open items and provides an audit trail of completed work.

1. On the **Task Details** screen, locate the **Status** field. C-FIRST! displays the current task status (e.g., *Pending* or *In Progress*).
2. If the task status is *In Progress*, locate the **Mark Complete** button at the top of the task record.
3. Click the **Mark Complete** button. C-FIRST! updates the task status to *Completed*.

Note: Observe that the **Mark Complete** button is replaced by a **Completed** button. This button allows you to change the status back to *Pending* if needed.



System Tip!

If you need to modify task details before completion, click the **Edit** button. C-FIRST! opens the task in edit mode.

Task 5: Review Approval Notifications

When you submit assessments or programs for approval, your supervisor receives a notification. After they approve or reject your submission, you will receive a notification of the decision.

1. Click the **Home** tab in the navigation bar. C-FIRST! displays your **Homepage**.
2. Check your notifications for approval-related tasks. Look for tasks like *Supervisor assigned you a task, Please review the record and Submit for Approval*.
3. If you see an approval notification, click the task to view details. C-FIRST! displays the task information.
4. Click the **Related To** hyperlink to navigate to the record requiring action. C-FIRST! opens the related finding or assessment.

Note: Review any comments from your supervisor explaining why the record was returned. Make necessary corrections before resubmitting.

Lesson 5: Managing Your User Profile and Preferences

Customizing your C-FIRST! profile and preferences help you work more efficiently on cases like the Carter family case. Setting default views, pinning frequently used list views, and understanding your profile settings confirms C-FIRST! is configured to support your workflow.

Learning Objectives

- Access and review your user profile information
- Set default list views using the pin feature
- Customize Homepage component visibility
- Use the refresh function to update list data

Task 1: Pin Default List Views

Pinning a list view sets it as your default when you access that tab. For cases, pinning the **My Primary Assigned Cases** view means you see your active caseload first.

1. Click the **Cases** tab in the navigation bar. C-FIRST! displays the **Cases** list view.
2. Click the **drop-down arrow** next to the current view name and select *My Primary Assigned Cases*. C-FIRST! displays cases assigned to you with status *Open* or *Completed*.
3. Click the **push pin** icon next to the **View** drop-down. C-FIRST! sets **My Primary Assigned Cases** as your default view for the **Cases** tab.
4. Click the **Home** tab in the navigation bar. C-FIRST! displays the **My Primary Assigned Cases** view by default.



Process Tip!

Pin the view you use most frequently. To view assigned cases, **My Primary Assigned Cases** is typically the most useful default view.

Task 2: Use List View Settings

List view settings allow you to customize how data is displayed, including column visibility and sort order. These settings help you organize case information efficiently.

1. On the **Cases** list view, click the **List View Controls** icon (gear icon) on the toolbar. C-FIRST! displays list view settings options.
2. Review available settings for column display and list behavior.
3. Click the **Select list display** icon (table icon) to switch between display formats. C-FIRST! offers alternative ways to view the list data.
4. Click the **Refresh** icon (circular arrow icon) to update the list with the latest data. C-FIRST! reloads the list view with current information.



System Tip!

Use the **Refresh** icon after making changes to case records to confirm the list view displays the most current data.

Lesson 6: Manual Task Creation

In C-FIRST!, Case Workers and Case Supervisors can manually create tasks and assign them to other users to support case-related activities. Manual task creation allows users to document work items with due dates, priorities, and user assignments.

Learning Objectives

- Navigate to the Today's Tasks List View from the C-FIRST! Homepage.
- Create a manual task record with all required fields on the New Manual Task screen.
- Identify the validation rule applied to the Due Date field during task creation.

Task 1: Navigate to the Today's Tasks List View

You need to navigate to the task list in C-FIRST! to view and manage tasks related to the Carter family case. From the Homepage, you will access the Today's Tasks dashboard to see all available tasks.

1. Click the **Home** tab. C-FIRST! displays the Homepage with available widgets and their associated reports.
2. Locate the **Today's Tasks** dashboard on the Homepage.
3. Click **View All** on the **Today's Tasks** dashboard. C-FIRST! displays the **Today's Tasks** List View with all tasks assigned to you.



System Tip!

Today's **Tasks** List View displays all tasks created for and assigned to you. From this view, you can create new tasks, edit existing tasks, or mark tasks as complete.

Task 2: Create a Manual Task Record

David Carter is placed with their maternal grandmother, Dorothy Carter. You need to create a manual task to schedule a follow-up home visit and assign it to the applicable user to verify placement safety.

1. Click **New Task** on the **Today's Tasks** List View. C-FIRST! displays the **New Manual Task** screen.
2. Enter *Schedule placement follow-up home visit* in the **Subject** field.
3. Enter the name of the assigned user in the **Assigned To** field.
4. Select the user from the lookup search results. C-FIRST! populates the **Assigned To** field with the selected user.
5. Review the **Status** field. C-FIRST! defaults this value to *Pending*.
6. Enter a future date in the **Due Date** field.
7. Click the **Priority** drop-down. C-FIRST! displays the available options.
8. Select the applicable priority value from the **Priority** drop-down.
9. Enter *Conduct follow-up visit to verify placement safety and well-being of children* in the **Comments** field.
10. Click **Save**. C-FIRST! creates the task record and displays the **Today's Tasks** List View.



System Tip!

Additional optional fields on the **New Manual Task** screen include **Name**, **Case ID**, **Related To**, and **Total Tasks**. Populate these fields when the information is available. The **Activity Type**, **Date Completed**, **Created By**, and **Last Modified By** fields are auto populated and not editable.



Process Tip!

Users can reassign tasks to other users after creation. Tasks cannot be bulk closed in C-FIRST!. Each task must be completed individually.

Knowledge Check!

Question 1: What is the first step you should take when you receive a notification that a new case has been assigned to you?

- A. Mark the task as complete
- B. Click the Related To hyperlink to navigate to the case
- C. Create a new case contact
- D. Submit the case for approval

Question 2: Which button allows you to set a list view as your default when accessing a tab?

- A. Settings (gear icon)
- B. Pin (push pin icon)
- C. Refresh (circular arrow icon)
- D. Filter (funnel icon)

Question 3: True or False: Once you have marked a task complete and the Mark Complete button is replaced by a Completed button, you can no longer change the status.

- A. True
- B. False

Module 2: Person Management

Person Management in C-FIRST! centralizes all individual records associated with a given case. The processes of adding persons, documenting their relationships, and recording visitation waivers are conducted within the case person record. Maintaining accurate person records is essential for court documentation, effective service planning, and appropriate case assignment throughout the case lifecycle.

A **Person record** represents the system-wide profile for an individual, accessible under the **Persons** tab. This record stores key biographical and demographic data such as name, date of birth, addresses, contact information, medical history, and more. Each individual involved with DCS—whether as a child, parent, relative, or foster parent—has a single, enduring Person record that persists across all system interactions. Furthermore, the person record includes a person type attribute, distinguishing individuals as either **Person** (citizen/client), **Staff** (DCS employee) or **Providers**.

When a person record is linked to a case, a **Case Person** record is created in C-FIRST!. When a worker selects **Search Case Person**, locates the individual, and clicks **Associate**, the system generates a new case person record. This record captures case-specific details not maintained at the person level, including

- Individual's Role on the Case (e.g., Child/Youth, Parent), Case Person Status (Active/Inactive)
- County Venue
- Preferences for Hearing and Meeting Alerts
- Visitation Waiver Status
- Other contextual fields.

Each case person entry also maintains its own person involvement history related list, documenting periods of activity or inactivity within the case.

The key distinction is that a single person record may be linked as a case person across multiple cases simultaneously, potentially fulfilling different roles or statuses. The person record identifies the individual, while the case person record specifies their involvement and capacity within a particular case.

Overview of Person Records vs. Case Person Records

Sarah Williams is a mother involved with DCS. She has one person record in C-FIRST! that stores her name, date of birth, home address, phone number, and demographics. That person record exists once in the system and never duplicates.

Now suppose DCS opens a Treatment case for her son, David. A case manager searches for Sarah, clicks Associate, and the system creates a case person record on that Treatment Case. On that case person record, the worker sets her role to *Parent*, her case person status to *Active*, and her **County Venue** to the appropriate county.

Once an adoption or SPG is added to the goal on the Permanency Plan and a Permanency Specialist needs to be assigned to the case, a Permanency Case is opened for David. The Treatment Case remains open and they are linked. The Case Manager continues to enter all of their work into the Treatment Case, and the Permanency Worker will complete their work (recruitment plans, adoption, SPG orders, etc.) in the Permanency Case. Sarah gets associated with that case too. The system creates a second case person record, this time on the Permanency Case. On this one, her role might still be "Parent," but her status, alerts, and involvement history are tracked independently from the Treatment Case.

So now Sarah has:

- One person record (her identity, contact info, demographics)
- Two case person records (one per case, each with its own role, status, county venue, alert preferences, and involvement history)

If Sarah moves to a new address, the case manager updates her Person record once, and that updated address is available everywhere. But if she becomes inactive on the Treatment Case while remaining active on the Permanency Case, that change only happens on the Treatment Case person record. The Permanency Case person record stays Active.

Case Types Overview

Before we move further along in our training, let's take a moment to discuss case types. C-FIRST! provides a comprehensive way to manage child welfare cases. Below are the TFACTS case types and how they compare to the case types that are in C-FIRST!.

TFACTS CASE TYPES	C-FIRST! CASE TYPES
Family Case	<i>Treatment Case</i>
Relative Caregiver	<i>Treatment Case:</i> Relative Caregiver is captured as a Program Type on the Treatment Case.
Adoption Case	<i>Permanency Case:</i> The Permanency Case only captures activities of the Permanency Specialists for both Adoption and SPG. The Treatment Case will remain open.
Subsidy Case-Adoption	<i>Adoption Case:</i> When the Adoption case opens, the Permanency Case will be closed. The Treatment Case may close depending on the status of siblings.
Subsidy Case- SPG	<i>Subsidized Permanent Guardianship Case:</i> When the SPG case opens, the Permanency Case will be closed. The Treatment Case may close depending on the status of siblings.
Extension of Foster Care	<i>Bright Futures</i>

Image 1: Case Types

Module Objectives

After completing this module, you will be able to:

- Add new persons to a case and complete case person detail fields
- Document Visitation Waivers for case persons
- Conduct and document a diligent search
- Review the Children Related List
- Document collateral contacts and staff involvement

Lesson 1: Managing Case Persons

You can associate multiple persons with a case, track their roles, and document information such as Visitation Waivers. In this lesson, you will add a case person, completing the detail fields, documenting a Visitation Waiver, and reviewing person involvement history.

Learning Objectives

- Add a new person to a case using the Search Case Person button
- Complete required and optional fields on the Case Persons detail screen
- Document a Visitation Waiver for a Case Person when face-to-face visits are not required
- Review the Person Involvement History list view to verify involvement timelines

Task 1: Add a New Person to a Case

Dorothy Carter has agreed to serve as the placement resource for Jaylen Carter, Aaliyah Carter, and Michael Carter. You need to add Dorothy Carter as a case person on the open Treatment Case.

1. Navigate to the desired case record in C-FIRST!.
2. Click the **Persons** related list. C-FIRST! displays the **Case Persons** list view.
3. Review the list view columns, which include **Case Person ID, Role, Last Name, First Name, Birthday, PID, and Case Person Status**.
4. Click **Search Case Person**. C-FIRST! displays the **Person Search** screen.

5. Enter the search criteria for the desired person in the available search fields.
6. Click **Search**. C-FIRST! displays matching results.
7. Click the arrow drop-down at the end of the person row and click **Associate**.



System Tip!

Click the hyperlink in the **Case Person ID** column to open an existing case person record for review or editing.



Process Tip!

Non- Emergency Person Records: You may encounter instances where there is a duplicate person record, but the person record needs to be established in the system. In a non-emergency situation, this person record is routed to the **Office of Data Governance and Analytics (ODGA)** queue for review. The ODGA will do research and provide a response within 3 business days.

Emergency Person Records: You may encounter instances where there is a duplicate person record and the person needs to be established in the system “day of”. In this emergency situation, the person is routed to the Directors Queue to review and approve.

Note: Please refer to policy and your supervisor’s guidance to determine which person records are considered emergency and non-emergency approvals; please use best practice to include person records during the initial phases of cases management.

Note: Please see the person record types graphic for more information.

INTAKE PERSON Intake Person A new intake person ID is assigned per intake. The same person can appear across multiple intakes with different IDs. <i>Sally: Intake A → ID 32456 Intake B → ID 856325 → PID 875235</i> • Name of Intake Person • Role as Related to Intake • Relationship to Victim • Gender at Birth • Date of Birth • Estimated Age ID TYPE: Intake Case Person ID — unique per intake	CASE PERSON Case Person A new case person ID is assigned per case. The same person receives a different case person ID in each case. <i>Jane Doe: Case 2020 → ID 56789 Case 2026 → ID 345678 → PID 12345</i> • Name of Case Person • Roles as Related to Case • Safe at Home Person • Relation • Active Domestic Violence Concern • Visitation Waiver • County of Venue • LifeSkills Assessment Exempt • Receive Hearing and Meeting Alerts • Seal Case Person (Adoption) • Criminal History & Background Checks • Custody • Legal Statuses ID TYPE: Case Person ID — unique per case		
PROVIDER PERSON Provider Person A different provider person ID is assigned for each provider record. The same person can have multiple provider associations. <i>Sue Smith: DCS Foster Home → ID 56789 Youth Villages → ID 23785 → PID 123456</i> <table border="0"> <tr> <td> • Name of Provider Person • Role as Related to the Provider Record • Occupation • SSN • Drivers License Number • Drivers License State • ICPC Home • Provider Portal Account Notification • Date of Birth • Age </td> <td> • Consent for Mailing Lists • Home Phone • Mobile Phone • Emergency Phone • Email • Address • Criminal History Background Checks • Training Activities • Waivers </td> </tr> </table>		• Name of Provider Person • Role as Related to the Provider Record • Occupation • SSN • Drivers License Number • Drivers License State • ICPC Home • Provider Portal Account Notification • Date of Birth • Age	• Consent for Mailing Lists • Home Phone • Mobile Phone • Emergency Phone • Email • Address • Criminal History Background Checks • Training Activities • Waivers
• Name of Provider Person • Role as Related to the Provider Record • Occupation • SSN • Drivers License Number • Drivers License State • ICPC Home • Provider Portal Account Notification • Date of Birth • Age	• Consent for Mailing Lists • Home Phone • Mobile Phone • Emergency Phone • Email • Address • Criminal History Background Checks • Training Activities • Waivers		

Intake Person, Case Person, & Provider Person

PERSON RECORD (PID)

Person Record (PID)

Single persistent record — the PID never changes no matter how many intakes, cases, or provider records.

Jane Doe's PID 12345 stays 12345 across all records, forever.

Core Identity		Education	Medical / Healthcare	Associated Records
- Name / Alias / Personal Photo - Sexual Orientation - Other Sexual Orientation - Safe Haven Child - Intellectual/Developmental Disability? - Safe at Home Person? - Birth Country - Birth State - Birth City - Birth County - Safe at Home Person? - Active Domestic Violence Concern? - Living Arrangement - Human Trafficking Survivor? - Marital Status - Other Marital Status - Military Status - Military Branch - Dependent on US Armed Forces Individual? - Actively Parenting? - Pregnant Status - Start Date of Pregnancy	- Estimated Due Date of Pregnancy - Has the child ever fathered/bore children? - Has the child ever been adopted? - Legalization Date of Last Adoption - Was the prior adoption type intercountry? - Was there a prior legal guardianship? - Prior Guardianship Date - TCSES Referral Status - Tribal Affiliation? - Tribe Name - Other Tribe Name - Federally Recognized Tribe? - CASA/Child Attorney Name - CASA/Child Attorney Contact - Religious/Spiritual Affiliation - Other Religious/Spiritual Affiliation - Occupation - Other Occupation - Employed Status - Employer Name - Employer Address	- School - Other School Type - Education Type - Program Type - Primary Disability - Current Grade - Last Grade Completed - Attendance Start Date - Attendance End Date - Education Status - Education Enrollment? - Enrollment Status - Other Enrollment Status - Diploma - Diploma Date - Certificate Status - Active IEPs? 504 Plans? - Education Surrogate Parent - Surrogate Parent Phone Number	- Medicaid MCO - Name of PCP - MCO Start Date - MCO End Date - Phone Number of PCP - PCP Address	- Alias - Attachments - Contact History - Moving Violations - Addresses - Allergies - Assessments - Care Coordination Notes - Consents - Credit Checks - Criminal History and Background Checks - Custody Records - Education - Eligibility - Gang Intelligence Reports - ICWA - Income - Injuries - Level of Care - Medical Appointment - Medical Assessment - Medical Insurance - Medical Providers - Medications - NYTD Surveys - Person Alerts - Physical Attributes - Placements - Referrals for Services - Runaway Summary - Substance Use - Cases - Provider Person Association - Records Request - Relationships - Personal Photo

Person Record

Task 2: Complete Case Person Details Fields

After selecting Dorothy Carter from the **Person Search** results, you need to complete her case person details. Dorothy Carter is the maternal grandmother and will receive hearing and meeting alerts for the case.

1. Review the **Case Person ID** field. C-FIRST! auto generates this value.
2. Review the **Person** field and **Person PID** field. C-FIRST! populates these from the person record.
3. Click the **Case Person Status** drop-down. Select *Active*.
4. Click the **Role** drop-down. Select the applicable role for the case person.
5. Review the **Safe at Home Person?** field. C-FIRST! populates this value from the person type person record.
6. Review the **Active Domestic Violence Concern?** field. C-FIRST! populates this value from the person type person record.
7. Click the **County of Venue** drop-down. Select the county where the case venue is located.
8. Click the **Receive Hearing and Meeting Alerts?** drop-down. Select *Yes*.
9. Review the **Visitation Waiver?** field. C-FIRST! defaults this value to *No*.
10. Click the **LifeSkills (IL) Assessment Exempt?** drop-down. Select the applicable value.
11. Review the **Seal Case Person? (Adoption)** field. C-FIRST! defaults this value to *No*.
12. Click the **Relation** drop-down. Select the applicable relation for the case person.
13. Review the **Case ID** field. C-FIRST! populates this value from the case record.
14. Click **Save**. C-FIRST! saves the record and displays the **Case Persons** list view.



System Tip!

C-FIRST! auto populates several fields on the **Case Persons detail screen**, including **Case Person ID**, **Person PID**, **Safe at**

Home Person?, **Active Domestic Violence Concern?**, and **Case ID**. These fields are not editable by the user.



Process Tip!

When you select *Yes* for **LifeSkills (IL) Assessment Exempt?**, C-FIRST! automatically updates any worklisted or in-progress LifeSkills 2.0 (IL) Assessment records for the person to a status of *Abridged*.

Task 3: Document a Visitation Waiver for a Case Person

Denise Carter has a court-ordered no-contact order with the children. You need to update her existing case person record to document a Visitation Waiver so that face-to-face visits between Denise Carter and the children are not required during this 30-day period.

1. Click the **Persons** related list on the case record. C-FIRST! displays the **Case Persons** list view.
2. Click the **Case Person ID** hyperlink for the desired case Person. C-FIRST! displays the **Case Persons** detail screen.
3. Click **Edit** to enable editing on the **Case Persons** detail screen.
4. Click the **Visitation Waiver?** drop-down. Select *Yes*.
5. Verify that the **Visitation Waiver Type** and **Visitation Waiver Details** fields now display on the screen.
6. Click the **Visitation Waiver Type** drop-down. Select the applicable waiver type.
7. Enter the details of the Visitation Waiver in the **Visitation Waiver Details** field.
8. Click **Save**. C-FIRST! saves the record and displays the **Case Persons** list view.



System Tip!

The **Visitation Waiver Type** and **Visitation Waiver Details** fields are conditionally visible. They only display when the **Visitation Waiver?** field is set to *Yes*.



Process Tip!

When a Waived Visitation is present in the 30-day period, a face-to-face visit between the child and parent or guardian is not required.

Task 4: Review Person Involvement History

You need to review the Person Involvement History for the case to verify the involvement timeline for Dorothy Carter. This will confirm when she was added to the case and whether any prior involvement periods exist.

1. Navigate to the desired person record in C-FIRST!.
2. Click **Person Type Person** record.
3. Click the **Person Involvement History** related list from the Related List Quick Links. C-FIRST! displays the **Person Involvement History** list view.
4. Review the **Start Date** column, which displays the date the case person record was created.
5. Review the **End Date** column, which displays the date a case person was set to *Inactive*.
6. Review the **Created By** column, which displays the name of the user who created the record.
7. Review the **Last Modified By** column, which displays the name of the user who last updated the record.



System Tip!

C-FIRST! automatically creates a new person involvement history record each time a case person record is created. All fields on this list view are auto populated and not editable by the user.



Process Tip!

When a case person status is updated to *Inactive*, C-FIRST! populates the End Date with the date of the status change. If the case person is later reactivated, C-FIRST! creates a new person involvement history record with a new Start Date.

Lesson 2: Conducting Diligent Searches

Users can document diligent search efforts to locate absent parents, relatives, and other persons connected to a child on a case. Diligent Search records capture the method, date, and outcome of each search attempt.

Learning Objectives

- Navigate to the Diligent Search list view from a case in C-FIRST!.
- Create a new Diligent Search record and complete all required fields.
- Add children to a Diligent Search record using the Add Children pop-up.

Task 1: Access the Diligent Search List View from a Case

You are working on the Treatment Case for the Carter family. Jaylen Carter and Aaliyah Carter have been placed with their maternal grandmother, Dorothy Carter. You need to review the Diligent Search records associated with this case.

1. Navigate to your Carter#### case.
2. Locate the **Related List Quick Links** section on the case.
3. Click the **Diligent Search** hyperlink. C-FIRST! displays the **Diligent Search** list view.
4. Review the columns on the **Diligent Search** list view, including **Diligent Search ID**, **Child/Youth**, **Diligent Search Date**, **Diligent Search Status**, **Diligent Search Sub-Type**, and **Method**.



System Tip!

Click the hyperlink in the **Diligent Search ID** column to open an existing record and view its details on the **Diligent Search** detail screen.

Task 2: Create a New Diligent Search Record

You need to document a Putative Father Registry search for the Carter family. This diligent search effort will capture the method and results of the search for the biological father of Jaylen Carter.

1. Click **New** on the **Diligent Search** list view.
2. Click **Next**. C-FIRST! displays the **New Diligent Search** pop-up.
3. Review the **Diligent Search Status** field. C-FIRST! defaults this field to *Pending*.
4. Enter the case person's name in the **Case Person ID** field.
5. Click the **Diligent Search Sub-Type** drop-down and select the required option. The options in the drop-down are:
 - Father
 - Informal Support/Other Adult
 - Mat Grandfather
 - Mat Grandmother
 - Mother
 - Other Relative
 - Pat Grandfather
 - Pat Grandmother
 - Putative Father
6. Enter today's date in the **Diligent Search Date** field.
7. Click the **Method** drop-down and select *Phone Call*. The other options in the drop-down are:
 - Attempted Face to Face
 - Attempted Phone
 - Attempted Visit to Potential Home Address
 - CLEAR Search
 - Contact Courts/Clerk
 - Contacting Agency Outside DCS
 - Correspondence
 - Criminal History Checks
 - Email
 - Government Webpages/Search Engine
 - Interview Child/Youth
 - Interview Parents
 - Interview Relatives/Kin
 - Mailing Notification Letter
 - Phone Call
 - Prison/Jail Search
 - Putative Father Registry
 - Received Response from Potential Relative
 - Records Search

- Reviewing Previous DCS History
 - Social Media
 - Text Message
 - Web Searches
 - Other
8. Enter *Phone call made to child's relative* in the **Diligent Search Notes** field.
 9. Click **Save**. C-FIRST! displays the **Diligent Search** detail screen for the newly created record.
 10. Locate the **Diligent Search ID** field. C-FIRST! generates this value automatically.
 11. Locate the **Case Name** field. C-FIRST! populates this value from the associated case.



System Tip!

C-FIRST! automatically defaults the **Diligent Search Status** to *Pending* when a new record is created. Users do not need to set this value during record creation.



Process Tip!

- When *Other* is selected in the **Method** drop-down, the **Other Method** field becomes required. C-FIRST! displays the error message *Complete this field.* if the **Other Method** field is left blank when saving.
- When the **Diligent Search Status** is *Completed*, the record becomes read-only for most users. Only users with the Child Program Supervisor, Regional Director, Executive Director, Assistant Commissioner, or Business Administrator role can edit a completed record.

Task 3: Add Children to a Diligent Search Record

You need to associate Jaylen Carter to the Diligent Search record. Adding children links them to the search effort and is required before the record status can be set to completed.

1. Locate the **Children** related list on the **Diligent Search** detail screen.

2. Click **Add Children**. C-FIRST! displays the **Add Children** pop-up.
3. Select the children to associate with the Diligent Search record.
4. Save and verify that the selected children display in the **Children** related list on the **Diligent Search** detail screen.



System Tip!

The **Add Children** pop-up displays case persons with the role of *Child/Youth* from the associated case. Only persons with this role are available for selection.

Lesson 3: Children Related List

The Children related list and screen capture the children involved in a case documentation contact. Users add children records to document contact privacy and whether social, medical, or educational information was discussed.

Learning Objectives

- Navigate to the Children related list from a case documentation record.
- Create a new children record to document child involvement in a contact.
- Identify auto populated fields on the Children detail screen.

Task 1: Navigate to the Children Related List

You need to document children involved in a recent face-to-face contact for the Carter case. Navigate to the case documentation record to access the Children related list.

1. Navigate the desired case documentation record on the case.
2. Locate the **Related List Quick Links** section on the case documentation record.
3. Click the **Children** hyperlink. C-FIRST! scrolls to the **Children** related list.
4. Review the **Children** list view. C-FIRST! displays existing children records with the **Person Involved ID** and **Name** columns.



System Tip!

Click the hyperlink in the **Person Involved ID** column to open an existing children record for review or editing.

Task 2: Create a New Children Record

You will add Jaylen Carter as a child on the case documentation record. During this face-to-face contact, the case contact was conducted privately and social, medical, and educational information was discussed.

1. Click **New** on the **Children** list view.
2. Click **Next**. C-FIRST! displays the **New Children** pop-up.
3. Enter the child's name in the **Case Person ID** field.
4. Review the **Name** field. C-FIRST! auto populates this field based on the selected case person.
5. Click the **Was Case Contact Conducted Privately?** drop-down. C-FIRST! displays the available options.
6. Select *Yes*.
7. Click the **Was Social/Medical/Education Discussed?** drop-down. C-FIRST! displays the available options.
8. Select *Yes*. **Note:** This field helps drive TCM billing. It is important to verify this is filled out correctly for funds tracking management.
9. Click **Save**. C-FIRST! displays the **Children** detail screen for the newly created record.
10. Review the **Case Documentation ID** field. C-FIRST! auto populates this field with the parent case documentation record identifier.
11. Review the **Created By** field. C-FIRST! auto populates this field with your user name.
12. Review the **Last Modified By** field. C-FIRST! auto populates this field with your user name.



System Tip!

C-FIRST! auto populates the **Name** field and the **Case Documentation ID** field. These fields are read-only and cannot be edited by users.

Click **Save & New** instead of **Save** to save the current children record and immediately open a new children pop-up. Use this option when adding multiple children to the same case documentation record.

Lesson 4: Collaterals Involved and Staff Involved

Workers can add collaterals to a case from the **Collaterals Involved** hyperlink. Workers are also able to add any staff members that need to be included in the case as a collateral. However, when staff members are added to the case as Collaterals, only specific workers have the ability to view this based on security access. Workers are only able to add collaterals to a case when that case is assigned to them. Collaterals. Collaterals provide supplementary information, while staff involved records capture personnel information on a case.

Learning Objectives

- Navigate to the Collaterals Involved list view from a court order record on a case
- Create a Collateral Involved record and identify auto populated fields on the detail screen
- Navigate to the Staff Involved list view from a Case Conference record on a case
- Create a Staff Involved record and recognize the duplicate staff validation rule

Task 1: View the Collaterals Involved List from a Court Order

Jaylen Carter's case has a court order on record for the removal of Jaylen and Aaliyah. Review the collaterals associated with this court order, including Ms. Patricia Lawson, the school counselor at Maple Grove Elementary who provided testimony.

1. Locate the **Related List Quick Links** section on the case.
2. Click the **Court Orders/Hearings** hyperlink. C-FIRST! displays the Court Orders/Hearings list view.
3. Click the hyperlink for the desired court order record. C-FIRST! displays the record detail screen.
4. Locate the **Related List Quick Links** section on the Court Order record.
5. Click the **Collaterals Involved** hyperlink. C-FIRST! displays the **Collaterals Involved** list view.
6. Review the columns displayed on the list view: **Collateral Involved ID, Collateral First Name, Collateral Last Name, Collateral Role, Phone Number, Address, and Email.**



Process Tip!

Collaterals are first added at the case level and then associated to court orders, Child and Family Team Meetings, case contacts, or case documentation. If no collaterals display on the list view, confirm that collaterals have been added to the case.



System Tip!

Click the hyperlink in the **Collateral Involved ID** column to open an existing collateral Involved record and view its detail screen.

Task 2: Create a Collateral Involved Record

Patricia Lawson a counselor at Jaylen Carter's school provided information during the court proceeding for the Carter family. You need to associate this collateral to the court order record.

1. Click **New** on the **Collaterals Involved** list view.
2. Click **Next**. C-FIRST! displays the **New Collateral Involved** pop-up.
3. Look up and select the collateral in the **Collateral ID** field.
4. Click **Save**. C-FIRST! displays the **Collaterals Involved** detail screen.
5. Click the **Collateral Involved ID** field. C-FIRST! auto generates this unique identifier.
6. Review the **Collateral First Name** and **Collateral Last Name** fields. C-FIRST! auto populates these values from the selected collateral record.
7. Review the **Collateral Role**, **Phone Number**, **Address**, and **Email** fields. C-FIRST! auto populates these values from the selected collateral record.
8. Review the **Court Order/Hearing ID** field. C-FIRST! displays the associated court order identification number.

The collateral must already exist on the Case before it can be associated here. The intermediate screen between clicking New and Next may display a record type selection.



System Tip!

The layout of the **New Collateral Involved** pop-up is identical to the layout of the **Collaterals Involved** detail screen.



System Tip!

All fields on the **Collaterals Involved** detail screen except **Collateral ID** are auto populated and not editable. C-FIRST! pulls Collateral First Name, Collateral Last Name, Collateral Role, Phone Number, Address, and Email from the selected collateral record.

Task 3: View the Staff Involved List from a Case Conference

Several staff members participated in a Case Conference for the Carter family. You need to view the Staff Involved list to confirm all participants have been documented.

1. Locate the **Related List Quick Links** section on the case.
2. Click the **Case Conferences** hyperlink. C-FIRST! displays the Case Conferences list view.
3. Click the hyperlink for the desired Case Conference record. C-FIRST! displays the record detail screen.
4. Locate the **Related List Quick Links** section on the Case Conference record.
5. Click the **Staff Involved** hyperlink. C-FIRST! displays the **Staff Involved** list view.
6. Review the columns displayed on the list view: **Staff Involved ID** and **Staff Name**.



System Tip!

Click the hyperlink in the **Staff Involved ID** column to open an existing Staff Involved record and view its detail screen.



Process Tip!

Staff Involved records are captured on **Supporting Case Conference, Treatment Case Conference, Permanency Case Conference, Child and Family Team Meeting, and Individual Recruitment Plan** screens.

Task 4: Create a Staff Involved Record

An additional staff member participated in the Carter family Case Conference and needs to be documented. You need to create a new Staff Involved record for that staff member.

1. Click **New** on the **Staff Involved** list view.
2. Click **Next**. C-FIRST! displays the **New Staff Involved** pop-up.
3. Look up and select the staff member in the **Staff Name** field.
4. Enter the agency name in the **Agency** field, if known.
5. Click **Save**. C-FIRST! displays the **Staff Involved** detail screen.
6. Review the **Staff Involved ID** field. C-FIRST! auto generates this unique identifier.
7. Review the **Staff Name** field. C-FIRST! displays the name of the selected staff member.
8. Review the **Case Conference ID** field. C-FIRST! displays the associated Case Conference identification number.



System Tip!

The layout of the **New Staff Involved** pop-up is identical to the layout of the **Staff Involved** detail screen.



Process Tip!

The **Case Conference ID** field displays only when the Staff Involved record is added on a Case Conference. The **Child and Family Team Meeting ID** field displays when added on a Child and Family Team Meeting. The **Individual Recruitment Plan ID** field displays when added on an Individual Recruitment Plan.

Lesson 5: Persons Involved on Case Conferences

C-FIRST! tracks persons involved on Case Conference records to document who participates in case planning activities. Users can navigate to the Persons Involved Related List, add new Person Involved records, and review person details linked to a Supporting Case Conference.

Learning Objectives

- Navigate to the Persons Involved Related List from a Supporting Case Conference record.
- Add a new Person Involved record to a Supporting Case Conference.
- Review fields on the Person Involved detail screen.

Task 1: Navigate to the Persons Involved List View on a Case Conference

Jaylen Carter's case has an upcoming Supporting Case Conference. You need to review the persons currently involved on this conference record.

1. Navigate to the Case for the child. C-FIRST! displays the **Case** screen.
2. Scroll to the **Related List Quick Links** section on the **Case** screen.
3. Click the **Case Conferences** hyperlink. C-FIRST! displays the **Case Conferences** Related List.
4. Click the desired Supporting Case Conference record. C-FIRST! displays the **Supporting Case Conference** screen.
5. Scroll to the **Related List Quick Links** section on the **Supporting Case Conference** screen.
6. Click the **Persons Involved** hyperlink. C-FIRST! displays the **Person Involved** List View.
7. Review the **Person Involved** List View, including the **Person Involved ID** and **Name** columns.



System Tip!

Click the hyperlink in the **Person Involved ID** column to open an existing Person Involved record. Click **New Person** to create a new record.



Process Tip!

The Persons Involved Related List captures persons involved across multiple record types, including Case Documentation, Supporting Case Conferences, and Child and Family Team Meetings.

Task 2: Add a New Person Involved Record to a Case Conference

You need to add Dorothy Carter, Jaylen Carter's maternal grandmother, Kevin Carter and Sandra Carter, Jaylen's uncle and aunt, as a person involved on the Supporting Case Conference record.

1. Click **New Person** on the **Person Involved** List View. C-FIRST! displays a selection dialog.
2. Select or search for the desired case person on the selection dialog.
3. Click **Next**. C-FIRST! displays the **New Person Involved** pop-up.
4. Locate the **Case Person ID** field on the **New Person Involved** pop-up. This lookup field links the Person Involved record to a case person.
5. Enter or search for the desired case person in the **Case Person ID** field.
6. Review the **Name** field. C-FIRST! auto populates this field based on the selected **Case Person ID** value.
7. Review the **Role** field. C-FIRST! auto populates this field from the case person record.
8. Click **Save**. C-FIRST! saves the record and displays the **Person Involved detail screen** for the newly created record.



System Tip!

The **Name** and **Role** fields are formula fields. C-FIRST! populates them automatically from the case person record. You cannot edit these fields.

Click **Save & New** instead of **Save** to save the current record and immediately begin creating another Person Involved record. Click **Cancel** to discard the record without saving.

Task 3: Review the Person Involved Detail Screen

After adding Dorothy Carter to the Supporting Case Conference, you need to verify the details on the Person Involved record.

1. Locate the **Person Involved ID** field on the **Person Involved detail screen**. C-FIRST! generates this unique identification number automatically.
2. Locate the **Case Person ID** field. This field displays the linked case person record.
3. Locate the **Name** field. C-FIRST! populates this field based on the selected **Case Person ID** value.
4. Locate the **Role** field. C-FIRST! populates this field from the case person record.
5. Locate the **Case Conference ID** field. C-FIRST! populates this field with the unique identification number of the linked Case Conference record.
6. Locate the **Created By** field. C-FIRST! populates this field with the name of the user who created the record.
7. Locate the **Last Modified By** field. C-FIRST! populates this field with the name of the user who last updated the record.



System Tip!

- The **Person Involved ID** field is an auto number field. C-FIRST! assigns this value when the record is created. You cannot edit this field.
- The **Navigation Links** section on the **Person Involved detail screen** includes a link back to the record from which you navigated.

Knowledge Check!

Question 1: Which two fields become visible on the Case Persons detail screen when the Visitation Waiver field is set to Yes?

- A. Case Person ID and Person PID
- B. Visitation Waiver Type and Visitation Waiver Details
- C. Seal Case Person? (Adoption) and LifeSkills (IL) Assessment Exempt?
- D. Safe at Home Person? and Active Domestic Violence Concern?

Question 2: What value does C-FIRST! default the Diligent Search Status field to when a new Diligent Search record is created?

- A. Completed
- B. In Progress
- C. Active
- D. Pending

Question 3: In the Add Children pop-up on a Diligent Search record, which Case Persons are available for selection?

- A. Case Persons with Receive Hearing and Meeting Alerts set to Yes
- B. Case Persons with a Visitation Waiver set to Yes
- C. Case Persons with the role of Child/Youth
- D. Case Persons with a Case Person Status of Active

Question 4: What happens in C-FIRST! when you select Yes for the LifeSkills (IL) Assessment Exempt? field on a Case Person record?

- A. C-FIRST! updates any worklisted or in-progress LifeSkills 2.0 (IL) Assessment records to a status of Abridged
- B. C-FIRST! populates the End Date on the Person Involvement History record
- C. C-FIRST! sets the Visitation Waiver? field to Yes
- D. C-FIRST! removes the Case Person from the Persons related list

Question 5: What value does C-FIRST! default the Visitation Waiver? field to on a new Case Person record?

- A. Yes
- B. No
- C. N/A
- D. Pending

Module 3: Court & Legal

Court and Legal functions in C-FIRST! track all court activity from petition filing through order completion. Petitions, motions, court orders, and hearings are separate record types that link together chronologically. Accurate court documentation supports compliance tracking and informs case planning decisions across worker roles.

Module Objectives

After completing this module, you will be able to:

- Create and manage petitions and motions on a case
- Document court orders and link court hearings
- Navigate court and legal records in JJ cases

Lesson 1: Managing Petitions

Petition records in C-FIRST! allow legal staff to document and track court filings for Termination of Parental Rights and Adoption proceedings. This lesson covers creating petition records, reviewing system defaults, and updating petition statuses to completion.

Learning Objectives

- Create a Termination of Parental Rights (TPR) Petition record from the Petitions and Motions list view.
- Identify system-defaulted fields on a new TPR Petition record.
- Complete a TPR Petition by entering required fields and updating the status.
- Create an Adoption Petition record for a Permanency Case.
- Identify validation rules that apply when completing petition records.

Task 1: Create a Termination of Parental Rights (TPR) Petition

Denise Carter has failed to make progress on her family permanency plan. The Department of Children's Services (DCS) legal team has determined that a Termination of Parental Rights (TPR) petition must be filed for Jaylen Carter and Aaliyah Carter. Create a new TPR Petition record on the Carter Treatment Case.

1. Login as the Assigned Attorney. Navigate to the Carter#### case record in C-FIRST!.
2. Click the **Petitions and Motions** hyperlink from the **Related List Quick Links** section. C-FIRST! displays the **Petitions and Motions** list view.
3. Click **New**. C-FIRST! displays the **New Petition/Motion** pop-up.
4. Click the **TPR Petition** radio button.
5. Click **Next**. C-FIRST! displays the **New Petition/Motion: TPR Petition** pop-up with fields for the new record.
6. Review the **Petition/Motion Status** field. C-FIRST! defaults this field to *Pending*.
7. Review the **Court Type** field. C-FIRST! defaults this field to *Juvenile*.
8. Review the **Court State** field. C-FIRST! defaults this field to *Tennessee*.
9. Enter 07/01/2025 in the **Petition/Motion Date** field.
10. Click the **Court County** drop-down. C-FIRST! displays a list of Tennessee counties.
11. Select *Knox*. C-FIRST! populates the **Court County** field.
12. Click the **Searched Putative Father Registry?** drop-down. C-FIRST! displays available options.
13. Select *Yes*. C-FIRST! populates the **Searched Putative Father Registry?** field.
14. Click **Save**. C-FIRST! creates the TPR Petition record and displays the **TPR Petition** detail screen.



System Tip!

- C-FIRST! defaults the Petition/Motion Status to Pending for all new petition records. The status can be updated later as the petition progresses.
- For TPR Petitions, C-FIRST! automatically defaults the Court Type to Juvenile. This default can be changed if needed.
- The TPR Petition option only displays when the Case Type is Treatment, and the Adoption Petition option only displays when the Case Type is Permanency.



Process Tip!

When a TPR Petition is created, C-FIRST! generates a task and sends a bell notification to all active assigned users on the case. This alerts the legal team that a new petition requires attention.

Task 2: Complete a TPR Petition

The TPR petition for Jaylen Carter has been filed with the Knox County Juvenile Court. Update the petition record with the filing details and set the status to reflect that the petition is complete.

1. Verify the **TPR Petition** detail screen displays from the previous task.
2. Review the **Custody Date** field. C-FIRST! populates this field from the latest custody record for the attached child.
3. Click the **Judge** drop-down. C-FIRST! displays a list of judges filtered by Knox County. **Note:** Judge field is not required while creating a petition. Workers will not be required to know who the judge is when filing a petition, but the field is there in case it can be documented.
4. Select a judge from the filtered list. C-FIRST! populates the **Judge** field.
5. Enter *D-2025-07-0142* in the **Docket Number** field.
6. Enter *TPR petition filed on behalf of Jaylen and Aaliyah Carter####*. in the **Notes** field.
7. Click the **Petition/Motion Status** drop-down. C-FIRST! displays available statuses.
8. Select *Completed*. C-FIRST! populates the **Petition/Motion Status** field.
9. Click **Save**. C-FIRST! saves the record and displays the **Petitions and Motions** list view.



System Tip!

- The Custody Date field is a formula field populated from the latest custody record for the attached child. This field is not editable by the user.
- The **Judge** drop-down filters available judges based on the county selected in the **Court County** field. If the assigned

judge does not display in the list, select *Other* and enter the judge name in the **Other Judge** field that displays.

- C-FIRST! automatically creates a TPR Court Order and Hearing record when the TPR Petition status is set to *Completed*. C-FIRST! copies the Children, Persons Involved, Court Type, and Docket Number from the petition to the new court order record.

Task 3: Create an Adoption Petition

Following the termination of Denise Carter's parental rights, Dorothy Carter is pursuing adoption of Jaylen Carter and Aaliyah Carter. Create an Adoption Petition to track the adoption proceedings.

1. Navigate to the Carter#### Permanency Case record in C-FIRST!.
2. Click the **Petitions and Motions** hyperlink from the **Related List Quick Links** section. C-FIRST! displays the **Petitions and Motions** list view.
3. Click **New**. C-FIRST! displays the **New Petition/Motion** pop-up.
4. Click the **Adoption Petition** radio button.
5. Click **Next**. C-FIRST! displays the **New Petition/Motion: Adoption Petition** pop-up with fields for the new record.
6. Review the **Petition/Motion Status** field. C-FIRST! defaults this field to *Pending*.
7. Review the **Court State** field. C-FIRST! defaults this field to *Tennessee*.
8. Review the **Case Name** field. C-FIRST! populates this field from the related case record.
9. Enter 07/15/2025 in the **Petition/Motion Date** field.
10. Click the **Court Type** drop-down. C-FIRST! displays available court types.
11. Select a court type from the list. C-FIRST! populates the **Court Type** field.
12. Click the **Court County** drop-down. C-FIRST! displays a list of Tennessee counties.
13. Select *Knox*. C-FIRST! populates the **Court County** field.
14. Click the **Judge** drop-down. C-FIRST! displays a list of judges filtered by Knox County.

15. Select a judge from the filtered list. C-FIRST! populates the **Judge** field.



System Tip!

For Adoption Petitions, the Petition/Motion Date cannot be a future date. C-FIRST! displays the error "Petition/Motion Date cannot be in the future." if a future date is entered.



Process Tip!

If the court is located outside of Tennessee, select *Out of State* from the Court County drop-down. C-FIRST! then requires the Court State field, and the Court State cannot be set to *Tennessee*.

Task 4: Save an Adoption Petition and Review Defaults

Dorothy Carter's Adoption Petition for Jaylen Carter is ready to save. Enter the remaining details, save the record, and review the auto generated defaults on the detail screen.

1. Enter *Adoption petition filed by Dorothy Carter#### for Jaylen and Aaliyah Carter####*. in the **Notes** field.
2. Click **Save**. C-FIRST! creates the Adoption Petition record and displays the **Adoption Petition** detail screen.
3. Review the **Petition/Motion ID** field. C-FIRST! assigns a unique identification number to the record.
4. Review the **Case ID** field. C-FIRST! populates this field from the parent case record.
5. Review the **Created By** field. C-FIRST! populates this field with your user name.
6. Review the **Last Modified By** field. C-FIRST! populates this field with your user name.
7. Locate the **Children** related list at the bottom of the **Adoption Petition** detail screen.
8. Locate the **Associated Court Orders/Hearings** related list below the **Children** related list.



System Tip!

The Case ID, Petition/Motion ID, Created By, and Last Modified By fields are auto populated and not editable by the user.

Lesson 2: Court Orders and Hearings

Court Orders and Hearings document legal decisions and proceedings that direct actions regarding the care and protection of children. C-FIRST! provides the ability to create, track, and associate multiple types of Court Order and Hearing records within a case.

Learning Objectives

- Navigate to the Court Orders and Hearings list view from a Case record.
- Create a D/N, Unruly, and Other Court Order/Hearing record and enter hearing and court details.
- Enter custody and reasonable efforts information on a D/N, Unruly, and Other Court Order/Hearing record.
- Create a TPR Court Order and Hearing record and enter outcome details.
- Add an Associated Petition/Motion to a Court Order/Hearing record.
- Add an Associated Court Order/Hearing to a Court Order/Hearing record.
- Review the Court Order/Hearing History for a Court Order/Hearing record.

Task 1: Access the Court Orders and Hearings List View

You need to review court orders and hearings for the Carter case. Jaylen Carter were placed with Dorothy Carter following allegations of physical abuse and neglect against Denise Carter.

1. Log in as the **Case Manager**. Navigate to the case record for the Carter#### family.
2. Locate the **Related List Quick Links** section on the case record.
3. Click **Court Orders and Hearings** from the **Related List Quick Links** section. C-FIRST! displays the **Court Orders and Hearings** list view.
4. Review the list view columns: **Court Order/Hearing ID, Record Type, Order Type, Children, Date of Hearing,**

Court County, Court Order/Hearing Status, and Order Date.



System Tip!

C-FIRST! populates the **Children** column with a comma-separated list of child names from the **Children** related list on each Court Order/Hearing record. Click a hyperlink in the **Court Order/Hearing ID** column to open an existing record.

Task 2: Create a D/N, Unruly, and Other Court Order/Hearing

A juvenile court hearing was held regarding custody of Jaylen Carter. You need to document the removal order and hearing details in C-FIRST! for the Carter case.

1. Log in as the **Case Manager**. Click **New** on the **Court Orders and Hearings** list view. C-FIRST! displays the **New Court Orders and Hearings** pop-up.
2. Click the **D/N, Unruly, and Other Court Order/Hearing** radio button.
3. Click **Next**. C-FIRST! displays the **New D/N, Unruly, and Other** pop-up.
4. Click the **Court Order Type** multi-select box. C-FIRST! displays available court order types.
5. Select *Removal Order* from the **Court Order Type** multi-select box.
6. Enter 07/15/2025 in the **Date of Hearing** field.
7. Enter 07/15/2025 in the **Order Date** field.
8. Enter 08/15/2025 in the **Date of Next Hearing** field.
9. Click the **Court County** drop-down. C-FIRST! displays available Tennessee counties.
10. Select *Knox* from the **Court County** drop-down.
11. Click the **Judge** drop-down. C-FIRST! displays judges filtered to the selected county.
12. Select the judge specified in your training materials from the **Judge** drop-down.
13. Enter 2025-DN-001234#### in the **Docket Number** field.
14. Review the **Court Order/Hearing Status** field. C-FIRST! defaults the value to *Pending*.

15. Click **Save**. C-FIRST! creates the record and displays the **D/N, Unruly, and Other Court Order/Hearing** detail screen.



Process Tip!

Both **Court Order Type** and **Hearing Type** are multi-select fields. You can select more than one value in each field. When completing a record, at least one value must be selected in either **Court Order Type** or **Hearing Type**.



System Tip!

- C-FIRST! defaults the **Court Type** field to *Juvenile* and pre-populates the **Court State** field to *Tennessee* when a D/N, Unruly, and Other Court Order/Hearing record is created.
- C-FIRST! filters the **Judge** drop-down based on the county selected in the **Court County** field. If the needed judge is not listed, select *Other Judge* and enter the name in the **Other Judge** field that displays.

Task 3: Enter Custody and Reasonable Efforts Details on a Court Order/Hearing

The court granted DCS custody of Jaylen Carter. You need to document the custody determination, reasonable efforts findings, and related details on the D/N, Unruly, and Other Court Order/Hearing record for the Carter case.

1. Click the **Court Order Started DCS Custody** drop-down on the **D/N, Unruly, and Other Court Order/Hearing** detail screen. C-FIRST! displays available values.
2. Select *Yes* from the **Court Order Started DCS Custody** drop-down. C-FIRST! displays the **Contrary to Welfare, Removal Due to Methamphetamine Exposure?**, and **Order Addresses Reasonable Efforts** fields.
3. Click the **Contrary to Welfare** drop-down. C-FIRST! displays available values.
4. Select the required value in the **Contrary to Welfare** drop-down.
5. Click the **Removal Due to Methamphetamine Exposure?** drop-down. C-FIRST! displays available values.
6. Select *No* from the **Removal Due to Methamphetamine Exposure?** drop-down.
7. Click the **Order Addresses Reasonable Efforts** drop-down. C-FIRST! displays available values.
8. Select *Initial Reasonable Efforts to Prevent Removal* from the **Order Addresses Reasonable Efforts** drop-down. C-FIRST! displays the **Reasonable Efforts Granted?** field.
9. Click the **Reasonable Efforts Granted?** drop-down. C-FIRST! displays available values.
10. Select *Yes* from the **Reasonable Efforts Granted?** drop-down.
11. Click the **Initiation or Changes to Child Support?** drop-down. C-FIRST! displays available values.
12. Select *No* from the **Initiation or Changes to Child Support?** drop-down.
13. Click the **Establishment or Changes to Paternity?** drop-down. C-FIRST! displays available values.
14. Select *No* from the **Establishment or Changes to Paternity?** drop-down.

15. Click **Save**. C-FIRST! saves the record and displays the **Court Orders and Hearings** list view.

Lesson 3: Custody Records and Legal Status

C-FIRST! tracks custody episodes and legal statuses for children associated with a case. Users create and manage these records from the case person record to document court-ordered custody and changes in legal status.

Learning Objectives

- Navigate to the Custody related list from a case person record in C-FIRST!.
- Create a new custody record and populate required fields for an active custody episode.
- Navigate to the Legal Statuses related list from a case person record in C-FIRST!.
- Create a new Legal Status record and populate required fields.
- Identify validation rules that govern Custody and Legal Status records.

Task 1: Navigate to the Custody Related List from a Case Person

Jaylen Carter has been removed from his home and placed with his maternal grandmother, Dorothy Carter. Navigate to the Custody related list on Jaylen Carter's case person record to view and manage custody records.

1. Navigate to the case record for the Carter#### family.
2. Locate the case person record for Jaylen Carter#### on the case.
3. Click the **Case Person** record for Jaylen Carter####. C-FIRST! displays the **Case Person** detail screen.
4. Click **Custody** from the **Related List Quick Links** section. C-FIRST! scrolls to the **Custody** related list.
5. Review the **Custody** list view. C-FIRST! displays columns for **Custody ID**, **Custody Status**, **Start Date**, and **End Date**.



System Tip!

- C-FIRST! also provides a navigation path to the Custody related list from a Court Order record. Navigate to the case record, click Court Orders and Hearings from the Related List Quick Links, then click Custody from the Court Order and Hearing record.
- Ensure that no active Custody record already exists for the child case person used in training, as C-FIRST! prevents a child from having two active custody records at the same time. Confirm that the Legal Status drop-down values and Custody Type drop-down values are available in the training environment before class

Task 2: Create a Custody Record for a Child

Jaylen Carter has been placed with Dorothy Carter following his removal. You need to create a new Custody record to document this custody episode for Jaylen Carter.

1. Click **New** on the **Custody** related list.
2. Click **Next**. C-FIRST! displays the new **Custody** record pop-up.
3. Review the **Client Name** field to confirm C-FIRST! populated the value from the case person record.
4. Click the **Custody Status** drop-down. Select *Active*.
5. Click the **Custody Type** drop-down. Select the applicable custody type for the scenario.
6. Review the **VPA Custody?** field to confirm C-FIRST! defaulted the value to *No*.
Note: VPA stands for Voluntary Placement Agreement.
7. Enter the start date of the custody episode in the **Start Date** field.
8. Click the **Caregiver 1 Name** field and select *Dorothy Carter####*.
9. Review the **PID** and **Gender** fields for Caregiver 1 to confirm C-FIRST! populated these values from the person record.
10. Click the **Relationship** drop-down for Caregiver 1. Select the applicable relationship to the child.
11. Click the **Commitment County** drop-down. Select the applicable county.
12. Click the **Reason for Custody** multi-select box. Select all applicable reasons for the custody episode.
13. Click the **Family Structure** drop-down. Select the applicable family structure value.
14. Click the **Environment at Removal** drop-down. Select the applicable environment at removal value.
15. Click **Save**. C-FIRST! saves the record and displays the **Custody** detail screen.



Process Tip!

C-FIRST! defaults **VPA Custody?** to *No* when a new Custody record is created. Change this value to *Yes* only if the custody is based on a Voluntary Placement Agreement.



System Tip!

Start Date is required when the **Custody Status** is *Active*. C-FIRST! also validates that the **Start Date** does not overlap with the **Start Date** and **End Date** timeframe of another Custody record for the same child.

Caregiver 1 Name and the **Caregiver 1 Relationship** field are both required when the **Custody Status** is *Active*. Caregiver 2 Name and Caregiver 2 Relationship are optional.

Task 3: Review Custody Record Validation Rules and Read-Only Fields

Before continuing, you need to review the **Custody** detail screen for Jaylen Carter to understand how C-FIRST! enforces validation rules and populates read-only fields on the record.

1. Review the **Custody ID** field. C-FIRST! auto generates this unique identifier and it is not editable.
2. Review the **Contrary to Welfare** field. C-FIRST! populates this value from the associated Court Order when one exists, and it is not editable.
3. Review the **Reasonable Efforts to Prevent Removal** field. C-FIRST! populates this value from the associated Court Order when one exists, and it is not editable.
4. Review the **Case Person ID** and **Client Type Person ID** fields. C-FIRST! populates both values from the case person record and they are not editable.
5. Scroll down to the **Associated Court Orders/Hearings** related list. C-FIRST! displays any Court Orders and Hearings linked to this Custody record.



System Tip!

When an End Date is populated, Custody End Reason is required. When Custody End Reason is populated, End Date is required. C-FIRST! also prevents the End Date from being set to a future date.



Process Tip!

When the Custody Type is Non-DCS Custody, the Non-DCS Custody Details field is required. When the Custody Type is DCS - JJ, the Transitioning to Aftercare field is visible and required.

Task 4: Navigate to the Legal Statuses Related List from a Case Person

Navigate to the Legal Statuses related list for Jaylen Carter to document a new legal status for the child.

1. Navigate back to the **Case Person** record for Jaylen Carter####.
2. Click **Legal Statuses** from the **Related List Quick Links** section. C-FIRST! scrolls to the **Legal Statuses** related list.
3. Review the **Legal Statuses** list view. C-FIRST! displays columns for **Legal Status ID**, **Legal Status**, **Start Date**, **End Date**, and **Created Date**.



System Tip!

Click the hyperlink in the Legal Status ID column to open an existing Legal Status record for viewing or editing.

Task 5: Create a Legal Status Record for a Child

You need to create a new Legal Status record for Jaylen Carter to document his current legal status following the custody determination.

1. Click **New** on the **Legal Statuses** related list. C-FIRST! displays the new **Legal Status** record pop-up.
2. Click the **Legal Status** drop-down. Select the applicable legal status value for the child.
3. Enter the legal start date in the **Legal Start Date** field.
4. Review the **Status** field to confirm C-FIRST! defaulted the value to *Pending*.
5. Click the **Status** drop-down. Select *Pending*.
6. Click **Save**. C-FIRST! saves the record and displays the **Legal Status** detail screen.



System Tip!

C-FIRST! defaults the Status to Pending when a new Legal Status record is created. Update the Status to Active once the legal status has been confirmed.



Process Tip!

Only a Business Administrator can update the Status to Abridged. When the Status is Abridged, the Abridge Reason and Abridge Notes fields are required. The Abridge Reason defaults to Created in Error.

Lesson 4: Legal Timelines

The Legal Timeline provides a visual representation of linked legal activities in chronological order. Users can review color-coded events and open associated records directly from the timeline.

Learning Objectives

- Access the Legal Timeline screen from a Person Type record.
- Identify linked legal events using color coding on the Legal Timeline.
- Open a legal event record from the Legal Timeline.

Task 1: Access the Legal Timeline

Jaylen Carter have an open case with linked legal activities. You need to access the Legal Timeline to review the chronological history of legal events for the Carter family case.

1. Navigate to the desired person record in C-FIRST!.
2. Click the **Timeline** tab. C-FIRST! displays the **Legal Timeline** screen.
3. Review the **Legal Timeline** screen. C-FIRST! displays a visual representation of linked legal activities in chronological order.



System Tip!

C-FIRST! populates the Legal Timeline from three record types: Court Orders/Hearings, Petitions/Motions, and Custody information. All fields on this screen are auto populated and not editable by the user.

Task 2: Review Legal Events on the Legal Timeline

C-FIRST! has populated the Legal Timeline with Court Orders/Hearings, Petitions/Motions, and Custody records for the Carter family case. You will review the linked legal events and their color coding, then open a record from the timeline.

1. Locate the **Month** fields along the timeline. C-FIRST! populates these automatically to display the chronological sequence of legal events.
2. Locate the **Court Orders/Hearings** bubbles on the timeline. C-FIRST! populates these from Court Orders/Hearings records associated with the case.
3. Locate the **Petitions/Motions** bubbles on the timeline. C-FIRST! populates these from Petitions/Motions records associated with the case.
4. Review the color coding on the timeline. C-FIRST! displays linked **Court Orders/Hearings** and **Petitions/Motions** with the same color.
5. Locate any *Custody Start* bubbles on the timeline. C-FIRST! creates a *Custody Start* bubble when a Custody Start Date is populated and the Custody Status is *Active*.
6. Locate any *Custody End* bubbles on the timeline. C-FIRST! creates a *Custody End* bubble when a Custody End Date is populated and the Custody Status is *Inactive*.
7. Click an activity bubble on the timeline. C-FIRST! opens the corresponding record for that legal event.



Process Tip!

C-FIRST! can automatically link certain legal events, such as Adoption Petitions and Adoption Court Orders/Hearings. Users can also manually link events, such as Petition to Petition, Petition to Court Order/Hearing, or Court Order/Hearing to Court Order/Hearing.



System Tip!

- Matching colors indicate that legal events are linked to one another. Use color coding to identify which Petitions/Motions are associated with which Court Orders/Hearings.
- C-FIRST! generates *Custody Start* and *Custody End* bubbles from Custody records. These bubbles follow the same color logic as Court Orders/Hearings and Petitions/Motions.

Lesson 5: Predisposition/Order of Reference Program

This lesson provides a brief overview of how to add a **Predisposition/Order of Reference** program in CFIRST!. These are situations where DCS needs to investigate a child's situation and provide the court with findings and recommendations before a decision is made about the child's placement or custody. This process is completed by **Case Managers**.

Learning Objectives

- Add the Predisposition/Order of Reference program to a Treatment Case

Task 1: Add Predisposition/Order of Reference

1. Navigate to the **Treatment Case Details** screen.
2. Access the **Related List Quick Links**.
3. Click the **Programs** Quick Link. The **Programs List View** displays.
4. Click the **New** button. The **New Program** screen displays.
5. Access the **General Request Information** section.
6. Select *Court* in the Referral Source field.
7. Leave the **ICJ Type** field blank.
8. Select *Case Manager* in the **Assignee** field.
9. Select the appropriate person in the **Case Person** field.
10. Select *Predisposition/Order of Reference* in the **Program Type** field.
11. Select *Active* in the **Program Status** field.

12. Enter the date the program begins in the **Program Start Date** field.
13. Leave the **Program End Date** field blank as we are not ending this program.
14. Click **Save**.
Note: For this case scenario for training, we are using the Court option. Please continue to refer to your Policy for selecting the field options on this page post Go-Live.

Knowledge Check!

Question 1: What does the Court Type field default to while creating a TPR Petition?

- A. Circuit
- B. Juvenile
- C. Family
- D. Federal

Question 2: Which of the following statements is TRUE regarding the Court Order Type and Hearing Type fields?

- A. Both fields are multi-select fields
- B. Only one value can be selected in each field
- C. When completing a record, at least one value must be selected in each field
- D. The record can be saved without populating both the fields

Question 3: Which field must be mandatorily populated when the Custody Status is set to Active?

- A. Client Name
- B. Commitment County
- C. Custody Type
- D. Start Date

Question 4: What does it mean when a Court Order/Hearing and a Petition/Motion share the same color on the timeline?

- A. They are linked legal events
- B. They were created the same day
- C. They are both inactive
- D. They both require supervisor approval

Question 5: How is the Judge drop-down list filtered?

- A. By Petition/Motion Status
- B. By the selected county
- C. By Docket Number
- D. By Court State

Module 4: Program & Task Management

Program and Task Management in C-FIRST! organizes the ongoing work assigned to a case. Programs capture service eligibility and planning data, while tasks track individual assignments with due dates and statuses. Supervisors can monitor workload distribution across their team through the caseload dashboard.

Module Objectives

After completing this module, you will be able to:

- Create and manage Programs on a case
- Create and complete Tasks assigned to a case
- Review worker caseloads using supervisor dashboard tools

Lesson 1: Programs List View

Programs in C-FIRST! capture information about services that help protect children from abuse and neglect, achieve permanent living situations, and promote overall health and development. Users access program records through the Programs related list on a Treatment Case or through the Programs tab in the top navigation.

Learning Objectives

- Navigate to the Programs related list from a Treatment Case.
- Identify the columns displayed in the Programs list view.
- Open a Program record from the Programs list view to review detail fields.

Task 1: Access the Programs Related List on a Treatment Case

Jaylen Carter and Aaliyah Carter have been placed with their maternal grandmother, Dorothy Carter. You need to access the Programs related list on the Carter Treatment Case to review program records associated with the children.

1. Navigate to the Carter#### Treatment Case.
2. Scroll to the **Related List Quick Links** section on the Case.
3. Click the **Programs** hyperlink. C-FIRST! displays the **Programs** list view.
4. Review the columns in the **Programs** list view: **Program ID**, **Case Person Name**, **Program Type**, **Program Status**, **Program Start Date**, and **Program End Date**.
5. Click the hyperlink in the **Program ID** column for the desired record. C-FIRST! displays the **Programs** detail screen.
6. Review the fields displayed on the **Programs** detail screen, including **Program ID**, **Case Person**, **Child Name**, **Program Type**, **Program Status**, and **Program Start Date**.
7. Review the **Assignee** field, which displays the user assigned to the program record.
8. Review the **Referral Source** field, which captures the source of the program referral.
9. Review the **Supervisor** field, which C-FIRST! populates based on the assigned the supervisor of the user.



System Tip!

- The **Programs** list view displays all program records associated with the Treatment Case. Click **New** to create a new program record or click an existing **Program ID** hyperlink to view the record details.
- C-FIRST! automatically populates the **Supervisor** field based on the user selected in the **Assignee** field. Users can edit the **Supervisor** field if needed.



Process Tip!

C-FIRST! defaults the **Program Status** to *Pending* when a new program record is created. Users update the status as the program progresses through the workflow.

Task 2: Create an FSS Program Record

Create a new FSS Program record for Jaylen Carter.

1. Open the child's case and go to the **Programs** area.
2. Click **New** to start a new Program record. The **New** button is used to create a new Program record.
3. In **Case Person**, choose the correct child or youth.
4. In **Program Type**, select **FSS**. The document says a DCS worker can add an FSS program to a case.
5. Check **Program Status**. When a new Program record is created, the system defaults the status to **Pending**.
6. Click the **Assignee** field and enter the Assignee.
7. If you are making the record **Active**, fill in the needed fields before saving:
 - a. **Program Start Date** is required when Program Status is Active.
 - b. **Referral Source** is required when Program Status is updated to Active.
 - c. **FSS Intervention Level** is required when Program Type is FSS and Program Status is Active.
8. The **FSS Intervention Level** may fill in by itself based on the **Referral Source** and FAST information. For example, Court and JJ set it to **Intensive**, and some Walk-In or CPS situations set it to **Moderate** or **Intensive**.
9. Click **Save** to save the new FSS record.



Process Tip!

- A child cannot have an **active FSS** record at the same time as an **active Custodial DNN/Unruly** program. The system will show an error if that happens.
- Systematically, **FSS** and **FCIP** follow a similar process in C-FIRST!: create the Program, activate it, complete required fields, assign staff, and manage the work through closure. The key

difference is not the navigation path, but the **assigned user role** and any **program-specific requirements or validations** that apply to that program type.



System Tip!

The **Programs** tab list view displays program records created across all of C-FIRST!. The **Programs** related list on a Treatment Case displays only records associated with that specific case.

Lesson 2: Custodial Juvenile Justice Program

Treatment Cases in C-FIRST! track Juvenile Justice (JJ) programs for youth who are already in DCS custody or placed on non-custodial supervision. During this lesson, you will create, activate, and close a JJ Program record, including the JJ-specific fields and validation rules that apply.

Learning Objectives

- Navigate to the Programs Related List on a Treatment Case in C-FIRST!.
- Create a Custodial JJ Program record and review JJ-specific conditional fields.
- Activate a JJ Program record by completing all required activation fields.
- Close a JJ Program record by completing all required closure fields.

Task 1: Navigate to the Programs Related List on a Treatment Case

Michael Carter (age 16) was adjudicated delinquent by Knox County Juvenile Court. His uncle, Kevin Carter remains actively involved as Michael's mentor throughout this period and plays a key role in Michael's eventual successful completion of supervision.

You need to access the Programs Related List on the Treatment Case for Michael Carter to view existing Program records.

1. Login as a **Case Manager** and Navigate to the desired Treatment Case.

2. Scroll to the **Related List Quick Links** section on the Treatment Case.
3. Click the **Programs** hyperlink. C-FIRST! displays the **Programs** list view.
4. Review the **Programs** list view, which displays the **Program ID, Case Person Name, Program Type, Program Status, Program Start Date,** and **Program End Date** columns.



Process Tip!

Treatment Cases can include multiple program types such as FSS, FCIP, RCP, Custodial JJ, Non-Custodial JJ, Independent Living, and ICJ Incoming. Each program type has unique conditional fields and validation rules.

Task 2: Create a Custodial JJ Program Record

Michael Carter (age 16) was adjudicated delinquent by Knox County Juvenile Court for felony theft; he was found to have stolen a vehicle with two older peers during a period of unsupervised contact with former neighborhood associates. The court determined that Michael's risk level required a DCS custodial commitment under the Custodial JJ program. This runs concurrently with his existing IL programming. His uncle Kevin Carter and Aunt Sandra Carter remains actively involved as Michael's mentor throughout this period and plays a key role in Michael's eventual successful completion of supervision.

1. Click **New** on the **Programs** list view.
2. Click **Next** on the selection screen. C-FIRST! displays the **New Program** pop-up.
3. Enter the youth's name in the **Case Person** field.
4. Select the matching case person result from the search list.
5. Click the **Program Type** drop-down.
6. Select *Custodial JJ*. C-FIRST! displays JJ-specific fields including **JJ Supervision Level**, **Intense JJ Track?**, and **Absconder**.
7. Review the **JJ Supervision Level** field, which C-FIRST! defaults to *Low* for Custodial JJ programs.
8. Click the **Intense JJ Track?** drop-down.
9. Select *No*.
10. Click the **Absconder** drop-down.

11. Select *No*.
12. Click the **Assignee** field and select the assigned user for this program.
13. Click **Save**. C-FIRST! displays the **Programs detail screen** with the **Program Status** field defaulted to *Pending*.



System Tip!

- C-FIRST! conditionally displays fields based on the selected **Program Type**. For *Custodial JJ*, the **JJ Supervision Level**, **Intense JJ Track?**, and **Absconder** fields display. For *Non-Custodial JJ*, the **JJ Sub Type** field also displays and is required.
- For *Custodial JJ* programs, C-FIRST! defaults the **JJ Supervision Level** to *Low*. For *Non-Custodial JJ* programs, the default is *High*. If a Trial Home Placement is later added for the youth, the **JJ Supervision Level** defaults to *High* regardless of program type.
- C-FIRST! defaults the **Program Status** to *Pending* for all new Program records. When the **Assignee** field is populated, C-FIRST! creates a task to remind the assigned user to complete the record.

Task 3: Activate a JJ Program Record

The Custodial JJ Program record for Michael Carter is currently in *Pending* status. You need to update the record to *Active* status and complete all fields required for activation.

1. Navigate to the **Programs detail screen** for the Custodial JJ Program record.
2. Click the **Program Status** drop-down.
3. Select *Active*.
4. Enter the program start date in the **Program Start Date** field.
5. Click the **Referral Source** drop-down.
6. Select the applicable referral source value.
7. Verify the **Assignee** field contains an assigned user.
8. Click **Save**. C-FIRST! saves the record and updates the **Program Status** to *Active*.



Process Tip!

For *Non-Custodial JJ* programs with a **JJ Sub Type** of *Probation/Diversion* or *Aftercare*, the **JJ Supervision Level** and **Intense JJ Track?** fields are also required on save.



System Tip!

- When the **Program Status** is updated to *Active* and the case person was previously on another case, C-FIRST! creates a task to explore historical connections for the youth.
- When the Case Person has an IDD designation of *Yes* and a *Custodial JJ* or *Custodial DNN/Unruly* program is activated, C-FIRST! creates tasks to refer the youth to the Strong Families Program and to create an application.

Task 4: Close a JJ Program Record

The Custodial JJ Program for Michael Carter is being closed because the youth's commitment has ended. You need to update the record to *Closed* status and complete all required closure fields.

1. Navigate to the **Programs detail screen** for the Custodial JJ Program record.
2. Click the **Program Status** drop-down.
3. Select *Closed*.
4. Enter the program end date in the **Program End Date** field.
5. Click the **Program Closure Reason** drop-down.
6. Select the applicable closure reason value.
7. Enter a summary of the program closure in the **Program Closure Summary** field.
8. Click **Save**. C-FIRST! saves the record and updates the **Program Status** to *Closed*.



System Tip!

- When the **Program Status** is updated to *Closed* and no other programs on the case have a **Program Status** of *Active* or *Pending*, C-FIRST! creates a task to close the Treatment Case.

- When a user does not have the Child Program Supervisor, Regional Director, Executive Director, Assistant Commissioner, or Business Administrator role, closed Program records become read-only.

Lesson 3: Non-Custodial Juvenile Justice Program

Treatment Cases in C-FIRST! track Juvenile Justice (JJ) programs for youth who are already in DCS custody or placed on non-custodial supervision. In this lesson, learners will use the **Jaylen Carter** scenario to navigate to the Programs related list, create a **Non-Custodial JJ** Program record, activate it, and close it at successful completion of supervision. This follows the guide's existing JJ lesson pattern and preserves the same lifecycle steps used for Custodial JJ programs.

Learning Objectives

- Navigate to the Programs Related List on a Treatment Case in C-FIRST!.
- Create a **Non-Custodial JJ** Program record and review JJ-specific conditional fields.
- Activate a **Non-Custodial JJ** Program record by completing all required activation fields.
- Close a **Non-Custodial JJ** Program record by completing all required closure fields.

Case Scenario: The Torres Family

Jaylen Carter and two classmates were found responsible for vandalizing the gymnasium at Whittle Springs Middle School, causing approximately \$400 in damages. Knox County Juvenile Court placed Jaylen on non-custodial juvenile justice supervision (Probation/Diversion). Unlike Michael's situation, Jaylen was not committed to DCS custody, he remained in Dorothy Carter's home throughout his supervision period. Dorothy and Kevin Carter provided consistent support and accountability during this time, and Jaylen completed all required obligations without further incident. The court has ordered **non-custodial supervision**, and a **Treatment Case** has been opened in C-FIRST! to support ongoing case management. A **Non-Custodial JJ Program** has been assigned to Jaylen to monitor compliance with court-ordered conditions, school attendance, counseling participation, and family stability. This scenario aligns with C-FIRST! program design, where Treatment Cases support multiple

program types, including **Non-Custodial JJ**, for youth placed on non-custodial supervision.

Task 1: Navigate to the Programs Related List on a Treatment Case

1. Navigate to the desired **Treatment Case** for Jaylen Carter####.
2. Scroll to the **Related List Quick Links** section on the Treatment Case.
3. Click the **Programs** hyperlink. C-FIRST! displays the Programs list view.
4. Review the Programs list view, including the Program ID, Case Person Name, Program Type, Program Status, Program Start Date, and Program End Date columns.

Task 2: Create a Non-Custodial JJ Program Record

1. Click **New** on the Programs list view.
2. Click **Next** on the selection screen. C-FIRST! displays the **New Program** pop-up.
3. Enter Jaylen Carter#### in the **Case Person** field.
4. Select the matching Case Person result from the search list.
5. Click the **Program Type** drop-down.
6. Select **Non-Custodial JJ**.
7. Review the JJ-specific fields that display.
8. In **JJ Sub Type**, select **Probation/Diversion**.
9. Review the **JJ Supervision Level** field and note that C-FIRST! defaults to **High** for Non-Custodial JJ programs.
10. Click the **Assignee** field and select the assigned user for this program.
11. Click **Save**. C-FIRST! displays the **Programs detail screen** with the **Program Status** field defaulted to **Pending**.



System Tip!

C-FIRST! conditionally displays fields based on the selected Program Type. For **Non-Custodial JJ**, the **JJ Sub Type** field displays and is required. The guide also notes that **Program Status** defaults to **Pending** for all new Program records, and

when the **Assignee** is populated, C-FIRST! creates a task to remind the assigned user to complete the record.

Task 3: Activate a Non-Custodial JJ Program Record

1. Navigate to the **Programs detail screen** for Jaylen Carter####'s Non-Custodial JJ Program record.
2. Click the **Program Status** drop-down.
3. Select **Active**.
4. Enter the **Program Start Date**.
5. Click the **Referral Source** drop-down.
6. Select **Juvenile Court**.
7. Verify the **Assignee** field contains an assigned user.
8. Verify **JJ Sub Type** is set to **Probation/Diversion**.
9. Complete any required JJ-specific activation fields.
10. Click **Save**. C-FIRST! saves the record and updates the Program Status to **Active**.



Process Tip!

For *Non-Custodial JJ* programs with a **JJ Sub Type** of *Probation/Diversion* or *Aftercare*, the **JJ Supervision Level** and **Intense JJ Track?** fields are also required on save.



System Tip!

When the **Program Status** is updated to *Active* and the case person was previously on another case, C-FIRST! creates a task to explore historical connections for the youth.

Task 4: Close a Non-Custodial JJ Program Record

Navigate to the **Programs detail screen** for Jaylen Carter's Non-Custodial JJ Program record.

1. Click the **Program Status** drop-down.
2. Select **Closed**.
3. Enter the **Program End Date**.
4. Click the **Program Closure Reason** drop-down.
5. Select the applicable closure reason value.
6. Enter the closure narrative in the **Program Closure Summary** field.

7. Click **Save**. C-FIRST! saves the record and updates the Program Status to **Closed**.



System Tip!

When the Program Status is updated to Closed and no other programs on the case have a status of Active or Pending, C-FIRST! creates a task to close the Treatment Case. The guide also notes that closed Program records become read-only for users without designated elevated roles.

Lesson 4: Create and Manage Programs

Programs in C-FIRST! track the services and interventions associated with children on a Treatment Case. Users create, activate, and close Program records to document the full lifecycle of each program assignment.

Learning Objectives

- Navigate to the Programs Related List on a Treatment Case.
- Create a new Program record from the Programs List View.
- Activate a Program record by completing all required fields.
- Close a Program record with a closure reason and summary.
- Review pending FSS Programs from the Programs tab.

Task 1: Access the Programs Related List on a Treatment Case

Jaylen Carter has an open Treatment Case. You need to view the Programs Related List to review existing Program records before adding a new program for the Carter family.

1. Log in as a **Case Manager**. Navigate to your Carter#### Treatment Case.
2. Scroll to the **Related List Quick Links** section on the Treatment Case.
3. Click the **Programs** hyperlink. C-FIRST! displays the **Programs** List View.
4. Review the **Programs** List View. The list displays columns for **Program ID**, **Case Person Name**, **Program Type**,

Program Status, Program Start Date, and Program End Date.

Task 2: Create a New Program Record

You will create a new Custodial DNN/Unruly Program record for Jaylen Carter to document the start of Family Safety Services on the Treatment Case.

1. Click **New** on the **Programs** List View. C-FIRST! displays a record type selection screen.
2. Click **Next**. C-FIRST! displays the **New Program** pop-up.
3. Enter *Jaylen Carter####* in the **Case Person** field. C-FIRST! displays matching results.
4. Select *Jaylen Carter####* from the results. C-FIRST! populates the **Child Name** field based on the selected case person.
5. Click the **Program Type** drop-down. C-FIRST! displays available program types.
6. Select *Custodial DNN/Unruly* from the **Program Type** drop-down.
7. Enter the Case Manager's name in the **Assignee** field.
8. Review the **Program Status** field. C-FIRST! defaults the value to *Pending*.
9. Click **Save**. C-FIRST! saves the record and displays the **Programs** detail screen for the newly created record.
10. Review the **Program ID** field. C-FIRST! displays an auto generated identification number that is not editable.



System Tip!

C-FIRST! automatically defaults the **Program Status** to *Pending* when a new Program record is created. You will update the status to *Active* in the next task.

C-FIRST! creates a task for the assigned user to complete the Program record when the **Assignee** field is populated.



Process Tip!

Treatment Cases support multiple program types including *FSS*, *FCIP*, *RCP (Stipend)*, *RCP (Non-Stipend)*, *Non-Custodial JJ*, *Custodial JJ*, *Custodial DNN/Unruly*, *Independent Living*, and *ICJ Incoming*. Select the program type that matches the services being provided to the case person.

Task 3: Activate a Program Record

The Custodial DNN/Unruly Program for Jaylen Carter is ready to be activated. You will update the status and complete all required fields on the **Programs** detail screen for the Carter family.

1. Click the **Program Status** drop-down on the **Programs** detail screen. C-FIRST! displays available statuses.
2. Select *Active* from the **Program Status** drop-down.
3. Enter *07/15/2025* in the **Program Start Date** field.
4. Click the **Referral Source** drop-down. C-FIRST! displays available referral sources.
5. Select *CPS* from the **Referral Source** drop-down.
6. Click **Save**. C-FIRST! saves the record and updates the **Programs** detail screen.



System Tip!

If no other Program records on the Treatment Case have a **Program Status** of *Active* or *Pending*, C-FIRST! automatically creates a task to close the Treatment Case.



Process Tip!

Once a Program record is closed, only users with the Child Program Supervisor, Regional Director, Executive Director, Assistant Commissioner, or Business Administrator role can edit the record. All other users will see the record as read only.

Systematically, **FSS** and **FCIP** follow a similar process in C-FIRST!: create the Program, activate it, complete required fields, assign staff, and manage the work through closure. The key difference is not the navigation path, but the **assigned user**

role and any **program-specific requirements or validations** that apply to that program type.

Lesson 5: Case Related Activities

Case Related Activities provide a consolidated view of all tasks associated with a case record. Users can review, create, and update activities to track due dates, assignments, and task completion across the case.

Learning Objectives

- Review the Case Related Activities List View from a case record.

Task 1: Review the Case Related Activities List View

The Carter family has a Treatment Case with several associated tasks. You need to navigate to the Case Related Activities for this case to review all activities, due dates, and assignments in one location.

1. Navigate to the case record for the Carter#### family.
2. Scroll to the **Related List Quick Links** section on the case record.
3. Click the **Case Related Activities** hyperlink. C-FIRST! displays the **Case Related Activities** List View.
4. Review the list of Case Related Activities records displayed on the **Case Related Activities** List View.
5. Review the **Subject, Due Date, Priority, Status, Assigned To, and Related To** columns.



System Tip!

The Case Related Activities List View consolidates all tasks from child records associated with the case. You do not need to navigate individual child records to view their respective tasks.



Process Tip!

C-FIRST! automatically tracks due dates and lists tasks by priority. Use the Case Related Activities List View to identify upcoming deadlines and verify task assignments across the case.

Lesson 6: Independent Living Program

Independent Living (IL) Program records within Treatment Cases support youth transitioning to adulthood. Users create and manage these records in C-FIRST! to track referrals, assigned staff, and program-related automated tasks.

Learning Objectives

- Navigate to the Programs Related List on a Treatment Case in C-FIRST!.
- Create a new Independent Living Program record with a default status of Pending.
- Activate an Independent Living Program record and complete all required fields.
- Identify automated tasks and notifications triggered by Independent Living Program activation.

Michael Carter is 16 years old and has been in DCS custody for two years. He is placed with his grandmother Dorothy Carter and attends Knox County High School, where he is enrolled in the vocational technology program. Kevin Carter, his uncle, has agreed to serve as his primary IL mentor and plans to introduce Michael to vocational opportunities in the construction trade. Sandra Carter provides additional support by assisting with transportation to after-school programs. Because Michael entered custody after age 14, a LifeSkills 2.0 Assessment must be created immediately, and a full Independent Living program record must be activated without delay.

Task 1: Access the Programs Related List on a Treatment Case

Michael Carter is associated with an open Treatment Case. You need to access the Programs Related List to review existing Program records before creating a new one.

1. Navigate to the Treatment Case for the Carter#### family.
2. Scroll to the **Related List Quick Links** section on the case record.
3. Click the **Programs** hyperlink. C-FIRST! displays the **Programs** list view.

4. Review the columns displayed on the **Programs** list view:
Program ID, Case Person Name, Program Type, Program Status, Program Start Date, and Program End Date.



System Tip!

Each Program record on the list view is linked to a specific case person. Click the hyperlink in the **Program ID** column to open an existing record and view its detail screen.

Task 2: Create a New Independent Living Program Record

Michael Carter requires a new Independent Living Program record on the Treatment Case. You will create the record and save it in a Pending status.

1. Click **New** on the **Programs** list view.
2. Click the **Case Person** field and select *Michael Carter####*.
3. Click the **Program Type** drop-down.
4. Select *Independent Living*.
5. Click the **Assignee** field and select the case manager.
6. Review the **Program Status** field. C-FIRST! defaults the value to *Pending*.
7. Click **Save**. C-FIRST! displays the **Programs** detail screen for the newly created record.



System Tip!

C-FIRST! automatically sets the **Program Status** to *Pending* when a new Program record is created. Users update the status to *Active* once all required information is confirmed.

Task 3: Activate the Independent Living Program Record

The Independent Living Program record for Jaylen Carter is in a *Pending* status. You will update the record to *Active* and complete all required fields on the **Programs** detail screen.

1. Click the **Program Status** drop-down on the **Programs** detail screen.
2. Select *Active*.
3. Enter the program start date in the **Program Start Date** field (for example, *07/01/2025*).

4. Click the **Referral Source** drop-down and select the applicable referral source value.
5. Click **Save**. C-FIRST! saves the record and triggers automated tasks based on the IL Program activation.



Process Tip!

When **Program Status** is updated to *Active*, the **Program Start Date**, **Assignee**, and **Referral Source** fields become required. C-FIRST! displays an error message if any of these fields are blank on save.



System Tip!

C-FIRST! populates the **Supervisor** field based on the organizational hierarchy of the selected **Assignee**. Users can edit this field if a different supervisor applies.



System Tip!

When an IL Program is activated and the user updating the status is not the Primary Case Assignee, C-FIRST! creates a bell notification for the Primary Case Assignee.

Task 4: Review Automated Tasks for Independent Living Programs

After activating the IL Program for Michael Carter, you will review the automated tasks and system behaviors C-FIRST! triggers for Independent Living Programs.

1. Review the **Programs** detail screen. C-FIRST! creates a task to remind the **Assignee** to complete the Program record when the **Assignee** field is populated.
2. Verify that C-FIRST! worklists a LifeSkills 2.0 Assessment when a case person in custody turns 14 years old or enters custody after age 14, provided the case person is not marked as LifeSkills exempt.
3. Verify that C-FIRST! worklists a LifeSkills 2.0 Assessment annually, 11 months after the last completed assessment,

for case persons aged 14 and older in custody who are not LifeSkills exempt.

4. Verify that C-FIRST! creates a task for an Independent Living Specialist when a case person in custody is 30 days from their 17th birthday.
5. Verify that C-FIRST! creates a task to review IL Indicators on the Permanency Plan when a case person in custody turns 14 years old.
6. Verify that C-FIRST! creates a task to add IL Indicators for Transition Plan creation on the Permanency Plan when an IL Program is activated for a case person aged 17 or older.
7. Verify that C-FIRST! creates a bell notification for the IL Program **Assignee** when a Child and Family Team Meeting (CFTM) record of type *Transition Plan* is created for the case person with an active IL Program.



Process Tip!

Case Persons marked as LifeSkills (IL) Assessment Exempt do not receive LifeSkills 2.0 Assessment worklist items. Pending LifeSkills tasks are systematically abridged when a case person is marked exempt.

Lesson 7: Service Requests

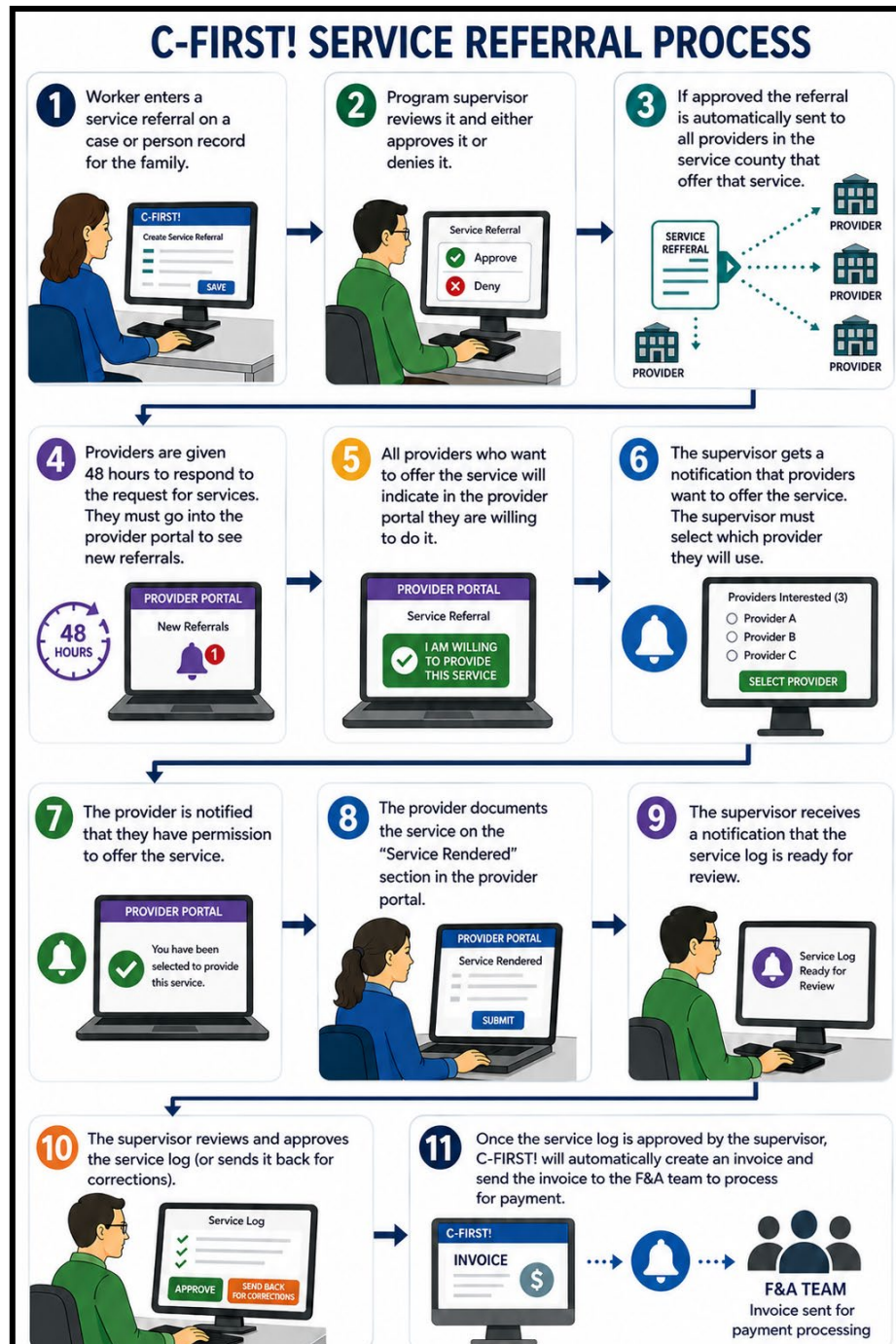
The process of creating service request in C-FIRST! is slightly different than what you may be used to. In C-FIRST!, a worker creates a new service request and marks the request as either paid or unpaid and then selects the service type. Service Referrals are now a service delivery type.

One of the biggest changes in the service request process is how the request does not go to **Fiscal** for review until the end of the process. And that the determination/approval of the service is sent to the **Program Supervisor**.

Once the service provider is confirmed, the **Provider Portal** creates a **Service Log** and the service provider documents the service. Next, the Service Log is sent for approval and is returned to the supervisor for approval. At this point, C-FIRST! creates an invoice, and this invoice is then sent to the Fiscal Team to review and manage. This process helps

keep service referrals between workers and their supervisors to make sure that these service referrals are processed more efficiently.

Refer to the image below for additional information on the process.



Service Referral Process

Learning Objectives

- Navigate to the Service Request related list from a Treatment Case.
- Create a new Service Requests Record and enter required fields.
- Document referral status and provider information.
- Create a Service Log.

The Carter family requires counseling services for Jaylen Carter. You will create a Service Requests and submit it for approval.

Task 1: Navigate to the Service Requests Related List

You need to access the Service Request related list on the Carter Treatment Case to review existing referrals before creating a new record.

1. Click the **Home** drop-down and select **Cases**. C-FIRST! displays the **Cases** screen.
2. Click the **Treatment Case ID** for the Carter#### family. C-FIRST! displays the **Treatment Case** record.
3. Scroll to the **Related List Quick Links** section.
4. Click the **Service Requests** hyperlink. C-FIRST! displays the **Referral for Services** list view with columns: **Service Record ID**, **Referral Date**, **Service Type**, and **Status**.

Task 2: Create a New Referral for a Service Record

Jaylen Carter requires counseling services. You need to create a new Referral for Services record on the Carter Treatment Case.

1. Click **New** on the **Service Request** list view. C-FIRST! displays the **New Service Request** screen.
2. Select the **Service Request** radio button and click **Next**.
3. Click the **Service Taxonomy ID** field and enter the Service Taxonomy ID.
4. Click **Save**. C-FIRST! saves the **Service Requests** record and displays the detail screen.

Task 3: Submit the Service Requests for Approval and Review the Result

The Referral for Services record for Jaylen Carter is ready for supervisor review. You need to submit the referral for approval and review the result after the approver completes the review. At least one Person Involved record must be added with the Role of Child/Alleged Child Victim, before you can submit the request

1. Click the **Approver** field in the **Approval Information** section.
2. Enter **Approver** name.
3. Enter the **Primary Child/Youth** name.
4. Enter the **Requested Start Date**.
5. Select the **Service County**.
6. Enter the **Anticipated End Date**.
7. Enter the **Requested Units/Hours**.
8. Select the **Community Resource?**.
9. Select if **Direct Provider Selection Required?**.
10. Click **Submit for Approval**. C-FIRST! displays a pop-up.
11. Enter description in the **Comments** field.
12. Click **Submit**. C-FIRST! routes the referral to the assigned approver.

Task 4: Review and Select Provider for Services

The Case Manager must navigate to the **Treatment Case**, and go back to the **Service Referral** record, to view all of the **Provider Contacts** records and make the selection.

1. Navigate to the **Case Details** screen.
2. Access the **Related List Quick Links**.
3. Click the **Service Requests** hyperlink. The Service Request List View displays.
4. Select the Service Request link. The **Service Referral Record** screen displays.
5. Select the **Provider Contacts** hyperlink. The **Provider Contacts List View** displays. This displays contact records for all providers who have accepted the services. Review the records and choose which provider best meets the needs of the service.
6. Select the **Provider Contact** hyperlink to access the Details screen.
7. Navigate to the **Provider Decision** section of the page.

8. Review the **Provider Response** field, which displays “Accept”. This information is pulled from the **Provider Portal**.
9. In the **Disposition Outcome** field, select “Approved”.
10. In the **Disposition Status** field, select “Completed”.
11. Click **Save**. The record saves and the provider is selected for the services.

Task 5: Service Log

Next, the provider provides services, accesses the **Provider Portal** and updates the record as “services rendered” and updates the following information: *Client Served, Provider, Service, Service Location, Service Unit Type*, and other information. This information is pulled into C-FIRST! and a **Service Log** is created. The **Service Log** populates with information from the Provider Portal.

1. Access the **Related List Quick Links**.
2. Click the **Services Log** hyperlink from the **Related Quick Links** section.
3. Select the **Service Log** record. The **Service Log Details** screen displays.
4. Access the **Service Information** section and review the information. **Note:** Once this service log is approved, C-FIRST! auto generates an invoice. This invoice is sent to Fiscal for payment.

Knowledge Check!

Question 1: What default value does C-FIRST! assign to the JJ Supervision Level field when a Custodial JJ Program record is created?

- A. Medium
- B. Low
- C. Intensive
- D. High

Question 2: When a Program Record is closed and no other Program Records on the Treatment Case have a Program Status of Active or Pending, what does C-FIRST! automatically create?

- A. A task to close the Treatment Case
- B. A bell notification for the Regional Director
- C. A new Program record with a Pending status
- D. A task to reassign the Case Person to another program

Question 3: Which three criteria does the Pending FSS Programs filter apply when selected on the Programs tab in C-FIRST!?

- A. Program Status is Active, Assignee is populated, and Program Type is FSS
- B. Program Status is Closed, Assignee is blank, and Program Type is FSS
- C. Program Status is Pending, Assignee is blank, and Program Type is FSS
- D. Program Status is Pending, Assignee is populated, and Program Type is FSS

Question 4: When the Status field on a Case Related Activity Record is updated to Completed, what does C-FIRST! do with the Date Completed field?

- A. Auto populates the field with the date from the task
- B. Leaves the field blank until a supervisor approves the record
- C. Displays an error message prompting the user to enter the completion date
- D. Clears the field and requires the user to enter a date manually

Module 5: Case Documentation & Conferencing

Case Documentation and Conferencing in C-FIRST! supports all narrative recording and formal case review activities. Case documentation, Case Conferences, and supervisory review records link directly to the case and the relevant family members. Accurate documentation builds the evidentiary record and supports continuity when cases transfer between workers.

Module Objectives

After completing this module, you will be able to:

- Create and complete case documentation linked to a case.
- Document Case Conferences and conference participants.

Lesson 1: Case Documentation

Case Documentation records capture interactions between Case Persons, Collateral Persons, and DCS employees. Users create and manage Case Documentation records from both the case record and the person record.

Learning Objectives

- Navigate to the Case Documentation list view from a case record.
- Create a new Case Documentation record and enter required fields.
- Add case persons and Collaterals to a Case Documentation record.
- Access Case Documentation records from a person record.

Task 1: Access the Case Documentation List View from a Case Record

Now, you need to locate existing Case Documentation records on the Carter case.

1. Navigate to the desired case record.
2. Locate the **Related List Quick Links** section on the case record.

3. Click the **Case Documentation** hyperlink. C-FIRST! displays the **Case Documentation** list view.
4. Review the list view columns: **Documentation ID**, **Documentation Type**, **Documentation Status**, **Date of Occurrence**, **Method**, **Assigned Users**, **Created By**, **Provider Portal Source**, **Children**, and **Person Involved**.
5. Click a hyperlink in the **Documentation ID** column to open an existing record. C-FIRST! displays the **Case Documentation** detail screen.



System Tip!

The **Children** column on the list view displays the names of children associated to the record through the **Children** related list. Names display in a comma-separated format of First Name Last Name.

Task 2: Create a New Case Documentation Record

You conducted a face-to-face visit with Jaylen Carter at Dorothy Carter's home. You need to create a new Case Documentation record to capture this interaction on the Carter Case.

1. Navigate to the **Case Documentation** list view on the Case record.
2. Click **New**. C-FIRST! displays a record type selection.
3. Click **Next**. C-FIRST! displays the **New Case Documentation** pop-up.
4. Select *Child Contact* from the **Documentation Type** multi-select box.
5. Enter the date of the visit in the **Date of Occurrence** field.
6. Click the **Duration of Contact** drop-down. Select the applicable duration value.
7. Click the **Method** drop-down. Select *Face to Face*.
8. Click the **Location** drop-down. Select *Home*.
9. Enter a description of the visit in the **Documentation Notes** field.
10. Click **Save**. C-FIRST! displays the **Case Documentation** detail screen for the newly created record.



System Tip!

C-FIRST! defaults the **Documentation Status** field to *Pending* when a new record is created and saved.

Users must add at least one child in the **Children** related list when selecting **Documentation Type** as *Child Contact* or *Parent-Child Contact*.



Process Tip!

The **Method** and **Location** fields are required for all Documentation Types except *Monthly Case Summary*, *Notation*, *Electronic Monitoring Unit Summary*, *Closing Summary*, and *Opening Case Summary*. If you save without these fields populated for a contact or visit type, C-FIRST! displays a validation error.

Task 3: Add Persons and Collaterals to a Case Documentation Record

You need to associate Jaylen Carter, Aaliyah Carter, Kevin Carter, and Dorothy Carter to the Case Documentation record you created on the Carter case.

1. Click **Add Persons/Collaterals** on the **Case Documentation** detail screen. C-FIRST! displays the **Add Persons/Collaterals** pop-up.
2. Review the list of active case persons and Collaterals available for selection.
3. Select the desired case persons and Collaterals to add to the record.
4. Click **Save**. C-FIRST! returns to the **Case Documentation** detail screen.
5. Scroll down to review the **Children** related list. C-FIRST! adds case persons with a role of *Child/Youth* to this related list.
6. Review the **Person Involved** related list. C-FIRST! adds case persons with any role other than *Child/Youth* to this related list.

7. Review the **Collaterals Involved** related list. C-FIRST! adds selected Collaterals to this related list.



System Tip!

C-FIRST! automatically sorts persons based on their case role. Case persons with a role of *Child/Youth* are added to the **Children** related list. All other case persons are added to the **Person Involved** related list. Selected Collaterals are added to the **Collaterals Involved** related list.



Process Tip!

When updating the **Documentation Status** to *Completed*, at least one Collateral, Person Involved, or children record is required. At least one person must also be added on the **Staff Involved** related list to complete the record.

Task 4: Access Case Documentation from a Person Record

You need to locate the Case Documentation records associated with Jaylen Carter from his person record.

1. Navigate to the **Persons** tab.
2. Click the desired person record to open it.
3. Locate the **Related List Quick Links** section on the person record.
4. Click the **Person Type** hyperlink from the **Related List Quick Links** section. C-FIRST! displays the **Person Type** related list.
5. Click an existing Client record. C-FIRST! displays the Person Type Person record.
6. Click the **Case Documentation** hyperlink from the **Related List Quick Links** section. C-FIRST! displays the **Case Documentation** list view.
7. Locate the filtered list of Case Documentation records. C-FIRST! displays only records where the person is a Person Involved or Child on the record.



System Tip!

C-FIRST! automatically filters the **Case Documentation** list view on a person record to display only records where that person is listed as a Person Involved or a Child. This filtering is automatic and cannot be changed by the user.

Lesson 2: Document Assessments

Assessments are rules-based evaluation instruments in the case lifecycle to capture information and guide decisions. After completing each assessment question, submit the assessment for supervisory approval.

Learning Objectives

- Complete behavioral management assessment and crisis plan.
- Conduct a Juvenile Justice Community Risk Tool.
- Complete a CANS assessment.
- Complete a FAST assessment.

Task 1: Complete Behavior Management Assessment & Crisis Plan

Complete a Behavioral Management Assessment and Crisis Plan for Michael Carter following his Custodial JJ adjudication. Michael has exhibited defiance and emotional withdrawal when confronted about his behavior, though he responds well to calm, one-on-one conversations with trusted adults.

1. Click the required case from the **Recently Viewed** list, the **Case** screen displays.
2. Click **Assessments** from the **Related Lists Quick Links** section. The **Assessments** screen displays.
3. Click **New**. The **New Assessment** pop-up displays.
4. Select from the following types of assessment types:
 - **Behavioral Management Assessment and Crisis Plan:** Captures the details of the Behavioral Management Assessment and Crisis Plan.
 - **CANS:** Captures the details of the Child Needs and Strengths assessment.

- **Drug Exposed Child Intake:** Captures the details of the Drug Exposed Child Intake.
 - **FAST:** Captures the details of Family Advocacy and Support Tool.
 - **Immediate Protection Agreement:** Captures the details of the Immediate Protection Agreement.
 - **Independent Living:** Captures the details of the Independent Living assessment.
 - **Juvenile Justice Community Risk Tool:** Captures the details of the Juvenile Justice Community Risk Tool.
 - **Non-Custodial Expedited Placement:** Captures the details of the Non-Custodial Expedited Placement assessment.
 - **PREA Risk:** Captures the details of the Prison Rape Elimination Act Risk assessment.
Note: This is only used by the SIU PREA team.
 - **Relative/Kinship Home Study:** Captures the details of the Relative/Kinship Home Study.
 - **Safe Sleep:** Captures the details of the Safe Sleep Assessment.
 - **TINS:** Captures the details of the Toddler Infant Needs and Strengths assessment for cases involved in Safe Baby Court.
5. Select the **Behavioral Management Assessment and Crisis Plan** radio button and click Next. The **New Assessment** pop-up displays.
 6. The **Assessment Information** section has the following fields:
 - **Household Name:** Captures the name of the household that the child is living in.
 - **Assessment Due Date:** Captures the date the Assessment is due.
 - **Attachments?:** Captures if there are any relevant documents.

- **Assessment Status:** Displays the status of the Assessment. The drop-down has the following options:
 - Abridged
 - Completed
 - Completed - Safety
 - In Progress
 - Worklisted
 - **Assigned Worker:** Captures the worker who is assigned to handle the case further.
 - **Child Name:** Captures the name of the child victim.
 - **Assessment Location:** Captures the location of the assessment being conducted.
 - **Date and Time of Contact:** Captures the date and time the contact was made for the assessment.

Note: This section is auto populated; Case Workers must review all the information here to ensure that the information is correct.
7. Click **Save** to save the record.
 8. Click the **Questionnaire** tab below the **Related Lists Quick Links** section on the **Assessment** record screen. The **Behavior Management Assessment and Crisis Plan Questionnaire** tab displays.
 9. The questionnaire has 5 sections:
 - The **Assessment Info** section has the following fields:
 - ACV Name
 - Custody Start Date
 - Legal Status

Note: This section is auto populated; Case Workers must review all the information here to ensure that the information is correct.
 - The **Youth Input** section has the following questions:
 - What makes you feel safe?
 - What types of things anger or frustrate you?
 - When you get upset how do you calm down?
 - Is there anything we should or should not do to help you calm down if you get upset?
 - Based on your past experience, are there situations/things that we should know about that

may trigger bad memories or your past trauma that may cause you to act out?

- Is there anything we can do to help you calm down if you are triggered so that we do not have to use handcuffs or shackles?
- Have you ever been placed in handcuffs or shackles? If so, did you have any negative side effects?
- The **Parent/Caretaker Input** section has the following questions:
 - Was a parent or caregiver present?
 - In the past what types of discipline methods have worked when your child is not following your rules?
 - What makes your child feel emotionally and physically safe?
 - Are there specific actions/things that may trigger his/her negative behavior?
 - Are there specific actions/things that you have used to calm your child down when upset?
 - Has your child ever been placed in handcuffs or shackles or retained in anyway? If so, were there any negative side effects?
- The **Crisis Plan** section has the following fields:
 - Summarize triggers or actions that result in negative behavior.
 - List strategies or activities DCS and youth can use to try to help you calm down.
- The **Names of Persons who can help you calm down** section has the following field:
 - Youth agrees to tell staff when they start feeling anger so other strategies may be used to prevent the use of handcuffs or shackles.

10. Click **Save** to complete the questionnaire.

Task 2: Conduct a Juvenile Justice Community Risk Tool

The Residential Case Manager conducts a Juvenile Justice Community Risk assessment for Michael Carter within 30 days of recommending a Trial Home Visit. Michael has been stable in Dorothy Carter's home

and Kevin Carter has provided consistent mentorship throughout his Custodial JJ program period.

The Juvenile Justice Community Risk Tool is used when a child is going on a home visit to see if they need an ankle monitor. The assessment contains a set of questions, and produces a score and rating based on the responses.

1. Click the required case from the **Cases** tab list. The **Case** screen displays.
2. Click **Assessments** from the **Related Lists Quick Links** section. The **Assessments** screen displays.
3. Click **New**. The **New Assessment** pop-up displays.
4. Select the **Juvenile Justice Community Risk Tool** radio button and click Next. The **New Assessment** pop-up displays.
5. The **Assessment Information** section has the following fields:
 - Household Name
 - Assessment Due Date
 - Attachments?
 - Assessment Status
 - Assigned Worker
 - Child Name
 - Assessment Location
 - Date and Time of Contact
6. Scroll down to the **Score** section.
7. Click the **Monitor Decision** drop-down and select if monitoring is required.
8. Click the **Home Visit Within 10 Business Day** drop-down and select if Home Visit was conducted Within 10 Business Days to assess safety/conditions.
9. Click the **Date of Home Visit** field and enter the required date.
10. Click **Save** to save the record.
11. Click the **Questionnaire** tab below the **Related Lists Quick Links** section on the **Assessment** record screen. The **Assessment Juvenile Justice Community Risk Questionnaire** tab displays. The questionnaire tab has the following sections;
 - Assessment Information
 - Questionnaire.
12. The **Assessment Information** section has the following fields:
 - Youth Name

- Date of Custody
- Current Placement
- Placement Start Date

13. The **Questionnaire** section has the following questions:

- List all Sexual Assault Adjudications (include dates)
- Was Force Used During the Commission of the Sexual Offense?
- List all Violent Adjudications (include dates)
- Was the Victim of the Sexual Offense Less Than 12 Years Old and at Least 4 Years Age Difference?
- History of Possessions of a Weapon
- Describe Weapon
- Total Number of Non-Violent Adjudications
- Total Referrals for Violent/Assaultive Adjudications
- Substance Abuse/Use
- Peer Relationships
- Parental/Guardian Engagement
- Number of Disruptions Due to Youth Non-Compliance
- Parent/Guardian Home Supervision
- Age of First Delinquent Referral to JJ Court Intake
- History of Runaways From Home
- Number of Prior Custodial Episodes
- Behavioral Incidents at Placement
- History of Runaways From Out-of-Home Placements
- Parent/Guardian/Sibling Legal History (past 12 months)

14. Click **Save** to complete the questionnaire.

Task 3: Conduct a Child and Adolescent Needs and Strengths (CANS) Assessment

The Child and Adolescent Needs and Strengths (CANS) Assessment is used to support care planning and level of care decision-making to identify and address the placement, treatment and permanency needs of youth. An approved CANS within first 30 days of a QRTP placement is required.

Complete a CANS assessment for Jaylen Carter to inform permanency planning.

1. Click the **Home** drop-down and select **Cases**.
2. Click the required case from the **Recently Viewed** list, the case screen displays.

3. Click **Assessments** from the **Related Lists Quick Links** section. The **Assessments** screen displays.
4. Click **New**. The **New Assessment** pop-up displays.
5. Select the **CANS** radio button and click **Next**. The **New Assessment** pop-up displays.
6. Enter information in the **Assessment Information** section.
7. Click **Save**. The assessment is created.

1. Click the **Family Together** tab.
2. The **Assessment Fast Family Together Questionnaire** has the following questions:

- Financial Resources
- Residential Stability
- Physical Condition of Home (Safety Item)
- Home Maintenance (Safety Item)
- Natural Supports
- Family Conflict (Safety Item)
- Resiliency
- Family Safety (Safety Item)

Note: All the above questions also have a corresponding mandatory **Justification** field that must be filled out if the score is 0-3.

8. Click **Caregiver** tab if the Assessment is for the Caregiver
9. Click **Add Assessment Person**. The **New Assessment Person** pop-up displays.
10. Click the **Case Person ID** and enter the name of caregiver.
11. Click the **Assessment Person Type** drop-down and select Caregiver. The other options in the drop-down are:
 - Caregiver
 - Child
 - Parent/Custodian
 - Other Household Member
12. Click the **Relation To** drop-down and select the relationship.
13. Click **Save**. The caregiver is added.
14. Select the **Assessment Person ID** radio button. The **Assessment CANS Caregiver Questionnaire** displays.
15. The **Caregiver Resources and Needs** section has the following questions:
 - Adjustment to Trauma Experiences

- Medical/Physical
- Developmental
- Mental Health
- Substance Use
- Parental Criminal Activity
- Supervision
- Discipline
- Involvement in Caregiving Functions
- Knowledge
- Safety
- Organization
- Social Resources
- Residential Stability

Note: All the above questions also have a corresponding mandatory **Justification** field that must be filled out if the score is 1-3.

16. Click **Youth** tab if the Assessment is for the youth.
17. Add the **Assessment Person** for the youth.
18. Select the **Assessment Person ID** radio button. The **Assessment CANS Youth Questionnaire** displays.
19. The questionnaire has the following sections:
 - Custody Information
 - Placement Information
 - Youth Traumatic Experiences
 - Youth Strengths
 - Youth Life Functioning
 - Cultural Factors
 - Youth Behavioral/Emotional Needs
 - Youth Risk Behaviors
 - Traumatic Stress Symptoms
 - Delinquency
 - Community Risk
 - Transition to Adulthood - Needs
 - Transition to Adulthood - Strengths
 - Commercially Sexually Exploited - Risk
 - Commercially Sexually Exploited - Case Specific Needs
 - CANS Scoring
20. Click **Save** to complete the questionnaire.

Task 4: Conduct a FAST Assessment

The Family Advocacy and Support Tool (FAST) assessment is used to evaluate a family for the purposes of evaluation and recommendation of services and helps users evaluate immediate risks to children and determine whether intervention is necessary.

1. In the **New Assessment** pop-up, select the **FAST** radio button and click **Next**.
2. Enter information in the **Assessment Information** section.
3. Scroll down to the **FAST/ JJ Probation CANS FFPSA Indicators** section.
4. Click the **Immediate Protection Agreement on Case?** drop-down and select if Immediate Protection Agreement is required.
5. Click the **Imminent Risk of Entering Custody?** drop-down and select if there is any imminent risk.
6. Click **Save**. The FAST assessment is created.
7. Click the **Family Together** tab.
8. The **Assessment Fast Family Together Questionnaire** has the following questions:
 - Financial Resources
 - Residential Stability
 - Physical Condition of Home (Safety Item)
 - Home Maintenance (Safety Item)
 - Natural Supports
 - Family Conflict (Safety Item)
 - Resiliency
 - Family Safety (Safety Item)

Note: All the above questions also have a corresponding mandatory **Justification** field that must be filled out if the score is 0-3.

9. Click the **Caregiver** tab if the assessment is for the Caregiver
10. Click the **Add Assessment Person** button to add caregiver as a person.
11. Select the **Assessment Person ID** radio button. The **Assessment FAST Caregiver Questionnaire** has the following questions:
 - Adjustment to Trauma Experiences

- Medical/Physical
 - Developmental (Safety Item)
 - Mental Health (Safety Item)
 - Substance Use (Safety Item)
 - Parental Criminal Activity (Safety Item)
 - Supervision (Safety Item)
 - Discipline (Safety Item)
 - Involvement in Care (Safety Item)
 - Knowledge of Family and Child Needs (Safety Item)
12. Click **Youth** tab if the Assessment is for the youth.
 13. Add the **Assessment Person** for the youth.
 14. Select the **Assessment Person ID** radio button. The **Assessment FAST Youth Questionnaire** has the following questions:
 - Sexual Abuse (Safety Item)
 - Physical Abuse (Safety Item)
 - Emotional Abuse (Safety Item)
 - Neglect (Safety Item)
 - Traumatic Grief
 - Witness to Family, School, or Community Violence
 - Relationship with Primary Caregiver
 - School
 - Medical/Physical
 - Development/Intellectual
 - Mental Health
 - Substance Use
 - High Risk Behavior
 - Runaway
 15. Click the **Trauma Exposure Module** section.
 16. In the **Commercial Sexual Exploitation (CSE)** field select *Yes* or *No* and enter **Justification** in the field.
 17. Click **Save** to complete the questionnaire.

Task 5: Assessments Related Lists

Step 1: Assessment Person

1. Click **Add Assessment Person**. The **New Assessment Person** pop-up displays.
2. Click the **Case Person ID** and enter the name of person.

3. Click the **Assessment Person Type** drop-down and select person type. The other options in the drop-down are:
 - Caregiver
 - Child
 - Parent/Custodian
 - Other Household Member
4. Click the **Relation To** drop-down and select the relationship.
5. Click **Save**. An assessment person is added.

Step 2: Assessment History

The **Assessment History** screen captures any changes made to the fields of an Assessment record. It also records the Date and Time of the change, the user who made the change, and the old and new values of the field.

Step 3: Approval History

The **Approval History** screen captures the approval history for the assessment.

Lesson 3: Child and Family Team Meeting (CFTM)

In C-FIRST!, users document CFTMs on a case record to capture meeting details, participant agreements, and next steps.

Learning Objectives

- Navigate to the Child and Family Team Meeting list view from a Case record in C-FIRST!.
- Create a new Child and Family Team Meeting (CFTM) record and populate all required fields.
- Document meeting narrative details and participant agreements on the Child and Family Team Meeting detail screen.
- Identify validation rules that apply when saving or completing a CFTM record.

Task 1: Access the Child and Family Team Meeting List View

Jaylen Carter, Aaliyah Carter, and Michael Carter are placed with their maternal grandmother, Dorothy Carter. A progress review CFTM is needed to evaluate the family's current status. You will navigate to the

Carter case record and access the Child and Family Team Meeting list view.

1. Navigate to the case record for the Carter#### family.
2. Scroll to the **Related List Quick Links** section on the case record.
3. Click the **Child and Family Team Meeting** hyperlink. C-FIRST! displays the **Child and Family Team Meetings** list view.
4. Review the columns displayed on the **Child and Family Team Meetings** list view: **Child and Family Team Meeting ID**, **Child and Family Team Meeting Status**, **Created Date**, **Completed Date**, **Scheduled Date**, and **Child and Family Team Meeting Type**.
5. Locate the **New** button on the **Child and Family Team Meetings** list view.



System Tip!

Click the hyperlink in the **Child and Family Team Meeting ID** column to open an existing CFTM record for review.

Task 2: Create a New Child and Family Team Meeting Record

You need to create a new CFTM record for the Carter family to document a progress review meeting. The meeting was held today and was scheduled for today's date. You will populate all required fields and save the record.

1. Click **New** on the **Child and Family Team Meetings** list view. C-FIRST! displays the **Child and Family Team Meeting** detail screen.
2. Review the **Child and Family Team Meeting ID** field. C-FIRST! auto generates this unique identification number.
3. Review the **Child and Family Team Meeting Status** field. C-FIRST! defaults the status to *Pending* when a new record is created.
4. Review the **Case Name** field. C-FIRST! populates this field from the Case record automatically.
5. Locate the **Child and Family Team Meeting Type** multi-select box. Select *Progress Review Custody*.

6. Enter today's date in the **Completed Date** field.
7. Enter today's date in the **Scheduled Date** field.
8. Click the **Is This a Q RTP Meeting?** drop-down. Select *No*.
9. Click the **Skilled Facilitator** field. Enter the name of the facilitator and select from the list.
10. Enter the following text in the **Purpose of This Meeting** field: *Review the family's current progress and discuss permanency goals for Jaylen and Aaliyah.*
11. Enter the following text in the **Youth/Family Story** field: *Denise is attending parenting classes and has maintained stable housing since the last review.*
12. Locate the **TennCare Appeal Rights Explained?** drop-down. Select *Yes*.
13. Click **Save**. C-FIRST! saves the record and displays the **Child and Family Team Meeting** detail screen.



System Tip!

C-FIRST! defaults the **Child and Family Team Meeting Status** to *Pending* on every new record. Users cannot change this default during initial creation.

When the **Is This a Q RTP Meeting?** drop-down is set to *Yes*, C-FIRST! requires the **Consultant Agrees with Q RTP Setting?** field before saving the record.



Process Tip!

C-FIRST! sends an email and SMS notification to each person on the Persons Involved related list 10 days before the **Scheduled Date**, when the person's Case Person Status is Active and Receive Hearing and Meeting Alerts is set to *Yes*.

The **TennCare Appeal Rights Explained?** field captures whether the family's TennCare appeal rights were reviewed during the meeting. This field supports compliance with requirement CM.FR.4.82.

Task 3: Document Meeting Details and Participant Agreements

The Carter family CFTM record has been created. You now need to document additional meeting narrative details, diligent search information, and participant agreement responses for this progress review meeting.

1. Enter the following text in the **Progress Towards Permanency** field: *Reunification remains the primary goal and Denise has completed three of five required services.*
2. Enter the following text in the **Next Steps** field: *Denise will complete remaining parenting classes and attend the Next scheduled court hearing.*
3. Enter the following text in the **Diligent Search Information** field: *No new information on absent father at this time and search efforts continue.*
4. Enter the following text in the **Other Notes and Considerations** field: *Dorothy reports children are adjusting well to the school routine.*
5. Click the **Reviewed Confidentiality Agreement?** drop-down. Select *Yes*.
6. Click the **Present Parties Agree to CFTM Decisions?** drop-down. Select *Yes*.
7. Click the **Team Members Agree to Share CFTM Notes?** drop-down. Select *Yes*.
8. Click the **If Kinship Move, Does Family Agree?** drop-down. Select *Yes*.
9. Click **Save**. C-FIRST! saves the updated meeting details on the record.



Process Tip!

After saving, the CFTM record includes three related lists: Persons Involved, Collaterals Involved, and Documents. Use these related lists to associate case persons, collateral contacts, and uploaded documents to this CFTM record.

Task 4: Complete a Child and Family Team Meeting Record

All meeting details for the Carter family CFTM have been documented. You will now update the record status to Completed. C-FIRST! enforces validation rules (like one Children record is mandatory) when the status changes, so you will verify that all required fields are populated before saving.

1. Verify that the **Next Steps** field contains text. C-FIRST! requires this field when the status is set to *Completed*.
2. Verify that a **Child** record has been added in the CFTM record before changing status to complete
3. Locate the **Child and Family Team Meeting Status** drop-down. Select *Completed*.
4. Click **Save**. C-FIRST! saves the record with the *Completed* status.
5. Review the **Completed Date** field to confirm it displays the date the meeting was held.
6. Review the **Child and Family Team Meeting Status** field to confirm it displays *Completed*.



System Tip!

At least one child must be added to the Children Related List to complete the Child and Family Team Meeting. Once a CFTM record is in *Completed* or *Abridged* status, the record becomes read-only for most users. Only users with the Program Director, Program Coordinator for Statewide Services Facilitation, Child Program Supervisor, Regional Director, Executive Director, Assistant Commissioner, or Business Administrator role can edit the record after completion.

Lesson 4: Managing Case Conferences

Users can create and manage Supporting Case Conferences to document structured meetings about a child's welfare. Users navigate to a Case record, select the applicable record type, and complete conference details including type, date, and notes.

Learning Objectives

- Access the Case Conferences list view from a case record in C-FIRST!.
- Create a new Supporting Case Conference record using the record type selection workflow.
- Identify auto generated default values on the Supporting Case Conference screen.
- Recognize validation rules that apply when saving a Supporting Case Conference record.

Task 1: Access the Case Conferences List View

A scheduled conference is approaching for the Carter family case to discuss ongoing support for Jaylen Carter. You need to navigate to the Case Conferences list view to review existing conference records before creating a new one.

1. Navigate to the desired case record.
2. Scroll to the **Related List Quick Links** section on the case record.
3. Click **Case Conferences** from the **Related List Quick Links** section. C-FIRST! displays the **Case Conferences** related list.
4. Review the **Case Conferences** list view. C-FIRST! displays columns for **Conference ID, Record Type, Case Conference Type, Conference Status, and Case Conference Date**.



System Tip!

The Case Conferences list view displays all Case Conference records associated with the Case, regardless of record type. Use this view to verify whether a conference already exists before creating a new record.

Task 2: Create a New Case Conference Record

No existing conference covers the upcoming meeting for the Carter family. You need to create a new Supporting Case Conference record to document discussions about the care Dorothy Carter is providing for David Carter.

1. Click **New** on the **Case Conferences** list view. C-FIRST! displays a pop-up.
2. Click the **Supporting Case Conference** radio button.
3. Click **Next**. C-FIRST! displays the **New Case Conference: Supporting Case Conference** pop-up.
4. Review the **Case Conference Status** field. C-FIRST! defaults this value to *Pending*.
5. Click the **Case Conference Date** field. Enter the date of the conference.
6. Click the **Case Conference Type** multi-select box. Select the applicable conference type or types for this meeting.
7. Review the **Discoverable** field. C-FIRST! defaults this value to *Yes*.
8. Enter details about the conference discussions in the **Notes** field.
9. Click **Save**. C-FIRST! displays the **Supporting Case Conference** detail screen for the newly created record.



System Tip!

C-FIRST! automatically defaults the Case Conference Status to *Pending* when a record is created manually. Do not change this value until the conference is complete.



Process Tip!

The **Case Conference Type** field is a multi-select box, allowing you to select more than one type per conference.

When *ASFA* is selected, the **Compelling Reason** field displays on the screen.

The **Discoverable** field is set to yes, unless legal agrees that the information should not be discoverable. If legal agrees that

the information should not be discoverable change this field to no.

Task 3: Review System-Generated Fields and Related Lists on the Case Conference

After saving the new Supporting Case Conference for the Carter family, you need to verify auto generated information and identify the related lists for associating persons and staff to the conference record.

1. Review the **Case Conference ID** field on the **Case Conference** detail screen. C-FIRST! auto generates this unique identifier.
2. Review the **Case ID** field. C-FIRST! auto populates this field with the associated case record.
3. Review the **Created By** field. C-FIRST! displays the name of the user who created the record.
4. Review the **Last Modified By** field. C-FIRST! displays the name of the user who last updated the record.
5. Scroll to the related lists section on the **Case Conference** detail screen.
6. Locate the **Person Involved** related list. Use this list to associate Case Persons to the conference record.
7. Locate the **Staff Involved** related list. Use this list to associate staff members to the conference record.



System Tip!

The **Case Conference ID**, **Case ID**, **Created By**, and **Last Modified By** fields are all auto populated and not editable by the user.



Process Tip!

Only a Child Program Supervisor or Team Coordinator can set the **Case Conference Status** to *Abridged*. When a conference is abridged, the **Abridge Reason** and **Abridge Notes** fields become visible and are required.

Use the **Comments** field to document information related to the task completion process.

Knowledge Check!

Question 1: In addition to adding a person/collateral/child, what else is required to complete the Case Documentation Record?

- A. A petition must be filed
- B. At least one person must be added to the Staff Involved Related List
- C. Custody End Date must be entered
- D. A judge must be added

Question 2: Which questionnaire section contains questions about triggers related to trauma?

- A. Parent/Caretaker Input
- B. Crisis Plan
- C. Youth Input
- D. Assessment Info

Question 3: If "Is This a QRTP Meeting?" is set to Yes, what additional field is required before saving?

- A. TennCare Appeal Rights Explained?
- B. Consultant Agrees with QRTP Setting?
- C. Persons Involved
- D. Child and Family Team Meeting ID

Question 4: When should you change Discoverable field to No?

- A. When the conference involves attorney-client privileged information
- B. When ASFA is selected
- C. Whenever the notes are incomplete
- D. When the conference is about placement stability

Module 6: Plan Development & Management

Plan Development and Management in C-FIRST! structures the formal service planning process. Custodial Permanency Plans, Non-Custodial Plans, and Child Safety Plans each have distinct fields, approval workflows, and timelines. Workers must complete required sections and route plans for supervisory approval before plans become active.

Module Objectives

This module first introduces all the different plan types and then moves on to adding responsibilities and managing approvals.

After completing this module, you will be able to:

- Create a Family Service Plan and complete all required sections.
- Route a plan for supervisory approval.
- Document Permanency Plan and Court Ordered Service Plan records.



System Tip!

- C-FIRST! defaults the **Plan Status** to *Pending* when a new Child Safety Plan is created. The **Plan Type, Plan ID, Case ID, Child Name, Created By,** and **Last Modified By** fields are auto populated and not editable by the user.
- Click **Save & New** instead of **Save** to save the current record and immediately begin creating another Plan record. Click **Cancel** to discard the record without saving.

Lesson 1: Plans Overview and Navigation

Permanency Plans document goals and responsibilities for achieving permanency, safety, and well-being for children involved in a case. Plan Participants are added to Plans to capture each person's strengths, goals, and related information.

Learning Objectives

- Navigate to the Plans Related List from a case record.
- Review Plan details on the Plans List View.
- Navigate to the Plan Participants Related List from a Plan record.
- Review Plan Participant details on the Plan Participants List View.
- View Plans associated with a person from the person record.

Task 1: Navigate to the Plans Related List from a Case Record

Jaylen Carter and Aaliyah Carter are placed with their maternal grandmother, Dorothy Carter. You need to review the Permanency Plans associated with the Carter family case.

1. Navigate to the Carter#### family case record.
2. Locate the **Related List Quick Links** section on the case record.
3. Click the **Plans** hyperlink from the **Related List Quick Links** section. C-FIRST! scrolls to the **Plans** Related List.
4. Review the **Plans** List View. C-FIRST! displays columns for **Plan ID**, **Record Type**, **Plan Status**, **Plan Date**, and **Plan Ratified?**.
5. Locate the desired Plan record in the list.
6. Click the hyperlink in the **Plan ID** column for the desired Plan. C-FIRST! displays the **Plan** detail screen.



System Tip!

Click **New** on the **Plans** List View to create a new Plan Record. Refer to the Custodial and Non-Custodial Permanency Plan lessons for creation steps.



Process Tip!

Plans can be *Custodial* or *Non-Custodial*. The **Record Type** column on the **Plans** List View identifies the type for each Plan.

Task 2: Navigate to Plan Participants from a Plan Record

You have opened a Custodial Permanency Plan for the Carter family. You need to review the Plan Participants associated with this Plan to confirm Jaylen and Aaliyah Carter are included.

1. Locate the **Related List Quick Links** section on the Plan record.
2. Click the **Plan Participants** hyperlink from the **Related List Quick Links** section. C-FIRST! scrolls to the **Plan Participants** Related List.

3. Review the **Plan Participants** List View. C-FIRST! displays columns for **Name**, **Participant Type**, **Goal 1**, **Goal 1 Target Date**, **Goal 2**, **Goal 2 Target Date**, **Goal 3**, **Goal 3 Target Date**, and **Person Involved ID**.
4. Locate the desired Plan Participant in the list.
5. Click the hyperlink in the **Name** column for the desired Plan Participant. C-FIRST! displays the **Plan Participants** detail screen.
6. Review the **Plan Participants** detail screen. C-FIRST! displays fields such as **Name**, **Person Involved ID**, **Participant Type**, **Summary of Strengths**, and goal fields.



System Tip!

Click **New Plan Participant** on the **Plan** detail screen to add a new participant. C-FIRST! displays the **Add Plan Participants** pop-up, where you select **Case Persons** and click **Next** to create records.



Process Tip!

The detail screen layout varies by **Participant Type**. Children and Youth participants display **Goal** and **Assessment** fields. Caregiver and Adult participants display **Visitation Plan** and **Summary of Strengths** fields instead.

Task 3: Review Assessment Information on a Plan Participant Record

You need to review assessment information for Jaylen Carter on his Plan Participant record to review scores that inform plan goals.

1. Open the Plan Participant record for Jaylen Carter#### from the **Plan Participants** List View.
2. Scroll to the **Assessment Information** section on the **Plan Participants** detail screen. C-FIRST! displays the participant's assessment scores.
3. Review the assessment section that displays on the screen. C-FIRST! populates read-only score fields from the linked assessment.



System Tip!

For Custodial Plan Participants linked to a CANS assessment, C-FIRST! displays the **CANS (Custodial) Scores** section. This section includes fields such as **Youth Traumatic Experience, Youth Strengths, Youth Life Functioning, Youth Behavioral/Emotional Needs, and Youth Risk Behaviors.**

For Non-Custodial Plan Participants, C-FIRST! displays the **FAST (Non-Custodial) Scores** section or the **TINS (Non-Custodial) Scores** (TINS is completed for any child in Safe Baby Court until the child turns age four) section based on the linked assessment type. All assessment score fields are auto populated and not editable.

Task 4: View Plans on a Person Record

You need to view all historical plans for Jaylen Carter directly from his person record to see plans across time.

1. Click the **Persons** tab. C-FIRST! displays the **Persons** list view.
2. Click the desired **Person** record for Jaylen Carter####. C-FIRST! displays the person record.
3. Locate the **Related List Quick Links** section on the person record.
4. Click the **Person Type** hyperlink from the **Related List Quick Links** section. C-FIRST! scrolls to the **Person Type** Related List.
5. Click an existing **Type** record. C-FIRST! displays the **Person Type Person** detail screen.
6. Locate the **Related List Quick Links** section on the Person Type Person record.
7. Click the **Plans** hyperlink from the **Related List Quick Links** section. C-FIRST! scrolls to the **Plans** Related List.
8. Review the **Plans** List View. C-FIRST! displays columns for **Plan ID, Record Type, Plan Status, Plan Date, and Plan Ratified?**
9. Click the hyperlink in the **Plan ID** column to open a plan record. C-FIRST! displays the **Plan** detail screen.



Process Tip!

When a person is a Plan Participant on a Plan, the Plan Record and its details automatically populate in the **Plans** List View on the Person Record. This allows you to view all current and historical Plans for a single person.



System Tip!

Select the person record to access the **Plans Related List**. Plans are associated to the person through their person type record.

Lesson 2: Non-Custodial Permanency Plans

Users create Non-Custodial Permanency Plans in C-FIRST! to document permanency goals for children who are not in DCS custody. Plans capture reasons for involvement, party agreement on goals, and serve as the foundation for responsibilities and court ratification.

Learning Objectives

- Navigate to the Plans List View from a case record.
- Create a new Non-Custodial Permanency Plan record from the Plans List View.
- Identify the fields and auto populated values on the Non-Custodial Permanency Plan screen.
- Complete a Non-Custodial Permanency Plan and identify required fields enforced by validation rules.
- Identify the related lists available on a Non-Custodial Permanency Plan record.

Task 1: Access the Plans List View from a Case Record

Denise Carter has an open Family Services Case. DCS does not have custody of Jaylen Carter or Aaliyah Carter, who remain in the home with maternal grandmother Dorothy Carter. You need to view the list of Plans associated with this case.

1. Navigate to the Case record in C-FIRST!. C-FIRST! displays the case record.
2. Locate the **Related List Quick Links** section on the case record.
3. Click the **Plans** hyperlink in the **Related List Quick Links** section. C-FIRST! displays the **Plans** List View.
4. Review the **Plans** List View, which displays the **Plan ID**, **Record Type**, **Plan Status**, **Plan Date**, and **Ratified** columns for all Plan records associated with the case.



System Tip!

The **Plans List View** displays all current and historical Plan Records for the case. Click the hyperlink in the **Plan ID column** to open an existing Plan Record.

Task 2: Create and Complete a Non-Custodial Permanency Plan

DCS is providing non-custodial services to the Carter family. You need to create a Non-Custodial Permanency Plan to document the permanency goals for Jaylen Carter.

The Carter family has participated in goal-setting discussions. All parties, including Denise Carter and Dorothy Carter, agree to the outlined goals. Next, you will need to update the Non-Custodial Permanency Plan to a Completed status.

1. Click **New** on the **Plans** List View. C-FIRST! displays a pop-up with record type options.
2. Click the **Non-Custodial Permanency Plan** radio button.
3. Click **Next**. C-FIRST! displays the **New Plan: Non-Custodial Permanency Plan** pop-up.
4. Review the **Plan ID** field. C-FIRST! generates this value automatically and it is not editable.
5. Review the **Plan Type** field. C-FIRST! populates this value automatically and it is not editable.
6. Review the **Case ID** field. C-FIRST! populates this field with the linked Case record and it is not editable.
7. Review the **Plan Status** field. C-FIRST! sets this value to *Pending* for all newly created plans.
8. Enter 07/01/2025 in the **Plan Start Date** field.
9. Enter *DCS is involved due to allegations of physical abuse and neglect. Children remain in the home with the maternal grandmother while the family works toward stability.* in the **Reason for Involvement** field.
10. Click **Save**. C-FIRST! displays the **Non-Custodial Permanency Plan** detail screen for the newly created record.
11. Verify the **Non-Custodial Permanency Plan** detail screen is displayed. If not, navigate to the **Plans** List View and click the hyperlink in the **Plan ID** column for the plan created in the previous task.
12. Enter 12/31/2025 in the **Plan End Date** field.
13. Click the **Present Parties Agree to Goals?** drop-down. Select *Yes*.

14. Enter the name of your supervisor in the **Approver** field and select the matching user from the lookup results.
15. Click the **Plan Status** drop-down. The following options are available:
 - Pending
 - Completed
 - Abridged
16. Select *Completed* from the **Plan Status** drop-down.
17. Click **Save**. C-FIRST! validates the required fields and displays the **Plans** List View.
18. Verify the updated Plan record displays a **Plan Status** of *Completed* in the **Plans** List View.



System Tip!

C-FIRST! automatically sets the **Plan Status** to *Pending* when a new **Non-Custodial Permanency Plan** is created. Users update this field to *Completed* or *Abridged* as the plan progresses.

After a plan is saved with a *Completed* status, the **Clone** button becomes available on the detail screen. Clicking **Clone** creates a new plan that carries over active **Plan Participants**, incomplete **Responsibilities**, and **IL Indicator** Records. All other fields are cleared on the cloned plan.



Process Tip!

Click **Save & New** instead of **Save** to save the current Record and immediately create another new Non-Custodial Permanency Plan. Click **Cancel** to discard the Record without saving.

When the **Plan Status** is set to *Completed*, the **Plan Start Date**, **Plan End Date**, and **Present Parties Agree to Goals?** fields are all required. C-FIRST! displays a "*Complete this field*" error on **Save** if any of these fields are empty.

Task 3: Review Non-Custodial Permanency Plan Related Lists and Ratification Fields

You need to review the related lists and ratification fields on the completed Custodial Permanency Plan for the Carter family case.

1. Navigate to the **Plans** List View on the case record.
2. Click the hyperlink in the **Plan ID** column for the completed plan. C-FIRST! displays the **Custodial Permanency Plan** detail screen.
3. Review the **Plan Ratified?** field. C-FIRST! populates this field automatically and it is not editable by users.
4. Review the **Ratification Court Order** field. This lookup field allows you to link a court order for plan ratification.
5. Review the **Plan Ratification Date** field. C-FIRST! populates this field automatically when a completed court order is linked to the plan.
6. Scroll down to the related lists section of the **Custodial Permanency Plan** detail screen.
7. Locate the **Plan Participants** related list, which allows you to associate Case Persons involved in the plan.
8. Locate the **Approval History** related list, which displays the approval history of the plan record.
9. Locate the **Responsibilities** related list, which allows you to add Plan Responsibilities for parents or caregivers.



System Tip!

When a court order with a status of *Completed* is linked to the plan, C-FIRST! automatically populates the **Plan Ratification Date** with the **Order Date** and sets **Plan Ratified?** to Yes.

Lesson 3: Custodial Permanency Plans

Custodial Permanency Plans document the long-term approach for maintaining stability, safety, and well-being of children in DCS custody. In C-FIRST!, users create and manage these plans from the Plans list view on a case record.

Learning Objectives

- Navigate to the Plans list view from a case record in C-FIRST!.
- Create a new Custodial Permanency Plan record.
- Enter required and optional information on the Custodial Permanency Plan detail screen.
- Identify the related lists associated with a Custodial Permanency Plan.
- Clone a completed Custodial Permanency Plan.

Task 1: Access the Plans List View from a Case Record

You need to create a Custodial Permanency Plan for the Carter family case.

1. Navigate to the desired case record in C-FIRST!.
2. Locate the **Related List Quick Links** section on the case record.
3. Click the **Plans** hyperlink in the **Related List Quick Links** section. C-FIRST! displays the **Plans** list view.
4. Review the **Plans** list view, which displays columns for **Plan ID**, **Record Type**, **Plan Status**, **Plan Date**, and **Plan Ratified?**.



System Tip!

The **Plans** list view displays all historic plan records for the case. Click the hyperlink in the **Plan ID** column to open an existing record.

Task 2: Create a New Custodial Permanency Plan Record

You will now create a new Custodial Permanency Plan for Jaylen and Aaliyah Carter. This plan will document the permanency goals and approach for the children while they remain in DCS custody.

1. Click **New** on the **Plans** list view. C-FIRST! displays the **New Plan** pop-up.
2. Click the **Custodial Permanency Plan** radio button on the **New Plan** pop-up.
3. Click **Next**. C-FIRST! displays the **New Plan: Custodial Permanency Plan** pop-up.
4. Review the **Plan Status** field, which defaults to *Pending*.
5. Enter the plan start date in the **Plan Start Date** field.
6. Enter the reason for DCS involvement in the **Reason for Involvement** field.
7. Click **Save**. C-FIRST! displays the **Custodial Permanency Plan** detail screen for the newly created record.
8. Review the **Plan ID** field, which displays an auto generated identification number.
9. Review the **Plan Type** field, which displays the auto populated plan type.
10. Review the **Case ID** field, which displays a hyperlink to the associated Case record.
11. Review the **Plan Ratified?** field, which is auto populated and not editable by the user.



System Tip!

C-FIRST! defaults the **Plan Status** to *Pending* when a new Custodial Permanency Plan is created. The **Plan Status** field is a required field on the record.

The **Plan Ratified?**, **Plan Ratification Date**, **Approval Status**, **Case ID**, **Created By**, and **Last Modified By** fields are all auto populated and cannot be edited by the user once a Court Order is linked to the plan.



Process Tip!

C-FIRST! automatically worklists a task to create a Custodial Permanency Plan when a **Custodial D/N/Unruly** or **Custodial**

JJ Program is created with an *Active* status. A task is also created when five months have passed from the last Custodial Permanency Plan start date.

Task 3: Enter Custodial Permanency Plan Details

You will now enter additional details on the Custodial Permanency Plan for the Carter family, including child support information and whether present parties agree to the permanency goals for Jaylen and Aaliyah Carter.

1. Enter the child support information in the **Child Support Details** field on the **Custodial Permanency Plan** detail screen.
2. Enter the plan end date in the **Plan End Date** field.
3. Click the **Present Parties Agree to Goals?** drop-down. C-FIRST! displays the available options. Select Yes.
4. Enter the name of the approving supervisor in the **Approver** field.
5. Click **Save**. C-FIRST! saves the updated Custodial Permanency Plan record.
6. Scroll down to review the related lists on the **Custodial Permanency Plan** detail screen.
7. Locate the **Plan Participants** related list, the **Approval History** related list, and the **Responsibilities** related list.



Process Tip!

The **Plan Participants**, **Approval History**, and **Responsibilities** related lists each have their own workflows. Refer to the Plan Participants, Approval Process, and Responsibilities lessons for detailed instructions.

Task 4: Clone a Completed Custodial Permanency Plan

Five months have passed since the last Custodial Permanency Plan was created for the Carter family. The previous plan for Jaylen Carter has a **Plan Status** of *Completed*. You need to clone the completed plan to begin a new planning period.

1. Navigate to the **Custodial Permanency Plan** record with a **Plan Status** of *Completed*.
2. Verify the **Plan Status** field displays *Completed*. C-FIRST! enables the **Clone** button when the **Plan Status** is *Completed*.
3. Click **Clone**. C-FIRST! creates a new Custodial Permanency Plan record and displays the detail screen.
4. Review the **Plan Status** field on the new record, which defaults to *Pending*.
5. Review the **Plan Participants** related list. C-FIRST! pre-populates all Plan Participants who are not marked as *Inactive* on the case.
6. Review the **Responsibilities** related list. C-FIRST! pre-populates all Responsibilities where **Completed?** is *No* from the original plan.
7. Verify all other fields on the new Custodial Permanency Plan record are cleared.



System Tip!

Only **D/N**, **Unruly**, and **Other or Juvenile Justice and ICJ Court Orders** can be linked in the **Ratification Court Order** field. C-FIRST! displays an error if an **Adoption**, **Subsidized Permanent Guardianship**, or **TPR Court Order** is selected.



Process Tip!

After a **Custodial Permanency Plan** is completed and the **Approval Status** is *Approved*, only the **Ratification Court Order** and **Plan Ratification Date** fields remain editable. All other fields become read-only for users who are not a Child Program Supervisor, Regional Director, Executive Director, Assistant Commissioner, or Business Administrator.

Lesson 4: Child Safety Plans

Users can create and manage Child Safety Plans to document resources, observations, and supports necessary to protect a child. In this lesson, you will navigate to the Plans List View, creating a new Child Safety Plan record, entering behaviors and responsibility areas, and reviewing associated Related Lists.

Learning Objectives

- Navigate to the Plans List View from a Case record in C-FIRST!.
- Create a new Child Safety Plan record.
- Enter behaviors and responsibility areas on a Child Safety Plan.
- Identify the Related Lists associated with a Child Safety Plan record.

Task 1: Navigate to the Plans List View from a Case Record

Jaylen Carter has been identified with at-risk behaviors following allegations of physical abuse. You need to navigate to the Plans List View on the Carter case record to view existing plans and prepare to create a new Child Safety Plan.

1. Navigate to the case record for the Carter#### family.
2. Click **Plans** from the **Related List Quick Links** section. C-FIRST! displays the **Plans** List View.
3. Review the **Plans** List View. C-FIRST! displays columns for **Plan ID**, **Plan Type**, **Plan Status**, and **Plan Date**.



System Tip!

Click the hyperlink in the **Plan ID** column to open an existing Plan record. Click **New** to create a new Plan.

Task 2: Create a New Child Safety Plan Record

You will create a new Child Safety Plan for Jaylen Carter to document behaviors and safety measures associated with the allegations of physical abuse. You will select Jaylen Carter as the case person and enter the plan date.

1. Click **New** on the **Plans** List View. C-FIRST! displays the **New Plan** pop-up.
2. Click the **Child Safety Plan** radio button.
3. Click **Next**. C-FIRST! displays the **New Plan: Child Safety Plan** pop-up.
4. Review the **Plan Status** field. C-FIRST! defaults the value to *Pending*.
5. Review the **Plan Type** field. C-FIRST! populates the value as *Child Safety Plan* based on the record type selection.
6. Enter *Jaylen Carter####* in the **Case Person ID** field. C-FIRST! populates the **Child Name** field with *Jaylen Carter####*.
7. Enter *07/15/2025* in the **Plan Date** field.
8. Click **Save**. C-FIRST! displays the **Child Safety Plan** detail screen for the newly created record.
9. Review the **Plan ID** field. C-FIRST! displays the auto generated identification number for this record.
10. Review the **Case ID** field. C-FIRST! displays the case identification number as a hyperlink to the case record.

Task 3: Enter Behaviors and Responsibility Areas on a Child Safety Plan

Jaylen Carter has exhibited aggressive outbursts toward younger children at school. You will document these behaviors on the Child Safety Plan and identify areas to address in the responsibilities section of the plan.

1. Locate the **Behaviors That Require Monitoring** multi-select box on the **Child Safety Plan** detail screen.
2. Select *Other Unsafe Behaviors* from the **Behaviors That Require Monitoring** multi-select box. The options in the multi-select box:
 - Danger to Others
 - Danger to Self
 - Other Unsafe Behaviors
 - Sexually Aggressive
 - Sexually Reactive
3. Enter *Aggressive outbursts toward younger children during recess* in the **Other Behaviors That Require Monitoring** field.
4. Select applicable values from the **Areas to Address in Action Steps** multi-select box per your training scenario.
5. Select applicable values from the **Areas field to Implement in Action Steps** multi-select box per your training scenario.
6. Click **Save**. C-FIRST! saves the updated **Child Safety Plan** record.



System Tip!

When *Other Unsafe Behaviors* is selected in the **Behaviors That Require Monitoring** multi-select box, the **Other Behaviors That Require Monitoring** field becomes required. The same rule applies to the **Sexually Aggressive Behaviors** multi-select box: selecting *Other Unsafe Behaviors* requires entry in the **Other Sexually Aggressive Behaviors** field. C-FIRST! displays a "Complete this field" error if the text field is left blank.



Process Tip!

Use the **Dissolution Date** field to record the date when the Child Safety Plan is no longer active. This field is not required at the time of creation but supports tracking the duration of a child's behavioral progress over time.

Task 4: Review Child Safety Plan Related Lists

After creating the Child Safety Plan for Jaylen Carter, you will review the Related Lists available on the record. These Related Lists allow you to associate observations, responsibilities, supports, and approval history to the plan.

1. Scroll down on the **Child Safety Plan** detail screen to the Related Lists section.
2. Locate the **Unsafe Behaviors and Triggers** in the Related List. This Related List allows you to associate observations to a child who is a case person.
3. Locate the **Responsibilities** Related List. This Related List allows you to associate responsibilities to case persons and the child.
4. Locate the **Supports** Related List. This Related List allows you to associate supports to a child who is a case person.
5. Locate the **Approval History** Related List. This Related List allows you to view the approval history of the record.



Process Tip!

Once the **Plan Status** is set to *Completed*, the record becomes read-only for most user roles. Only users with the Child Program Supervisor, Regional Director, Executive Director, Assistant Commissioner, or Business Administrator role can edit a completed Child Safety Plan.



System Tip!

When the **Plan Status** is set to *Abridged*, the **Abridge Reason** and **Abridge Notes** fields become visible and required. C-FIRST! displays a "Complete this field" error if either field is left blank.

Lesson 5: Unsafe Behaviors and Triggers and Supports

Observations and Supports are records captured on a Child Safety Plan or Youth Detention Center (YDC) Safety Plan. Users add Observations to document a child's behaviors and add Supports to identify persons who can assist the child on their Permanency Plan.

Learning Objectives

- Access the Unsafe Behaviors and Triggers list view from a Plan in C-FIRST!.
- Create an Unsafe Behaviors and Triggers record on a Plan.
- Access the Supports list view from a Plan in C-FIRST!.
- Create a Support record on a Plan.
- Add Persons and Collaterals to a Support record.

Task 1: Create an Unsafe Behaviors and Triggers on a Plan

Jaylen Carter's Child Safety Plan requires a behavioral observation. You will navigate to the Plan on Jaylen's case and create a new Observation record to document the observed behavior.

1. Navigate to the desired case record in C-FIRST!.
2. Click the **Plans** hyperlink from the **Related List Quick Links** section. C-FIRST! scrolls to the **Plans** related list.
3. Click the desired Plan record. C-FIRST! displays the **Plan** detail screen.
4. Click the **Unsafe Behaviors and Triggers** hyperlink from the **Related List Quick Links** section. C-FIRST! scrolls to the **Unsafe Behaviors and Triggers** related list.
5. Click **New**.
6. Click the **Unsafe Behavior or Trigger** drop-down. Select a value.
7. Enter a description of the observed behavior in the **Unsafe Behavior or Trigger Details** field.
8. Click **Save**. C-FIRST! displays the **Unsafe Behaviors and Triggers** detail screen for the newly created record.



Process Tip!

Unsafe Behaviors and Triggers can be captured on two Plan types: Child Safety Plan and YDC Safety Plan. The Unsafe Behaviors and Triggers related list will not display on other Plan types.



System Tip!

The **Unsafe Behaviors and Triggers ID** is system generated and is not editable. The **Plan ID**, **Created By**, and **Last Modified By** fields are also system populated and not editable.

Task 2: Review an Existing Unsafe Behaviors and Triggers Record

You need to review the Unsafe Behaviors and Triggers record you just created for Jaylen Carter's Child Safety Plan to verify the information was saved correctly.

1. Navigate to the **Plan** detail screen for the desired Plan record.
2. Click the **Unsafe Behaviors and Triggers** hyperlink from the **Related List Quick Links** section. C-FIRST! scrolls to the **Unsafe Behaviors and Triggers** related list.
3. Click the hyperlink in the **Unsafe Behaviors and Triggers ID** column for the desired record. C-FIRST! displays the **Unsafe Behaviors and Triggers** detail screen.
4. Review the **Unsafe Behaviors or Triggers** field to verify the selected value.
5. Review the **Behavior Details** field to verify the entered description.
6. Review the **Created By** and **Last Modified By** fields. C-FIRST! populates these fields with the name of the user who created and last modified the record.



System Tip!

From the **Observations** detail screen, you can update field values and click **Save** to save changes.

Task 3: Create a Support Record on a Plan

Dorothy Carter has agreed to serve as a support for Jaylen Carter's Child Safety Plan. You will create a Support record to document how Dorothy Carter can assist the children during the plan.

1. Navigate to the desired Case record in C-FIRST!.
2. Click the **Plans** hyperlink from the **Related List Quick Links** section. C-FIRST! scrolls to the **Plans** related list.
3. Click the desired Plan record. C-FIRST! displays the **Plan** detail screen.
4. Click the **Supports** hyperlink from the **Related List Quick Links** section. C-FIRST! scrolls to the **Supports** related list.
5. Review the **Supports** list view. Columns include **Support ID**, **Case Persons**, and **Collaterals**.
6. Click **New**.
7. Click **Next**. C-FIRST! displays the **New Support** pop-up.
8. Enter *Dorothy Carter#### will provide daily supervision and transportation for Jaylen and Aaliyah after school* in the **How Can They Support?** field.
9. Click **Save**. C-FIRST! displays the **Supports** detail screen for the newly created record.



Process Tip!

Supports can be captured on two Plan types: Child Safety Plan and YDC Safety Plan. The Supports related list will not display on other Plan types.



System Tip!

The **Support ID** is system generated and is not editable. The **Plan ID**, **Created By**, and **Last Modified By** fields are also system populated and not editable.

Task 4: Add Persons and Collaterals to a Support Record

You need to associate Dorothy Carter with the Support record as a Person Involved. At least one Case Person or Collateral must be added to the record.

1. Locate the **Persons Involved** and **Collaterals Involved** related lists on the **Supports** detail screen.
2. Click **Add Persons/Collaterals**. C-FIRST! displays the **Add Persons/Collaterals** pop-up.
3. Select the check boxes for the desired Case Persons or Collaterals to add to the Support record.
4. Click **Save**. C-FIRST! adds the selected persons to the record.
5. Verify that the selected Case Persons display in the **Persons Involved** related list on the **Supports** detail screen.
6. Verify that the selected Collaterals display in the **Collaterals Involved** related list on the **Supports** detail screen.



System Tip!

When a case person is selected, C-FIRST! adds the person to the **Persons Involved** related list. When a Collateral is selected, C-FIRST! adds the person to the **Collaterals Involved** related list.

Lesson 6: Plan Responsibilities

Responsibilities capture duties assigned to responsible case persons on a Plan and the details of those duties. Responsibilities have taken the place of needs, desired outcomes, and action steps. You can create, review, edit, and delete Responsibility records from Plans associated with a case.

Learning Objectives

- Navigate to the Responsibilities List View from a Plan record.
- Create a new Responsibility record and assign responsible persons.
- Review fields on the Responsibilities detail screen.
- Access edit and delete options for a Responsibility from the List View.

Task 1: Navigate to the Responsibilities List View

Michael Carter has an active Custodial Permanency Plan on their case. Kevin Carter has agreed to be responsible for Michael Carter. You need to access the **Responsibilities** on this plan to review and manage assigned duties for the Carter family.

1. Navigate to the case record for the Carter#### family.
2. Click **Plans** from the **Related List Quick Links** section. C-FIRST! displays the **Plans** Related List.
3. Click the desired plan record. C-FIRST! displays the **Plan** screen.
4. Click **Responsibilities** from the **Related List Quick Links** section. C-FIRST! scrolls to the **Responsibilities** Related List.
5. Review the **Responsibilities** Related List for existing Responsibility records associated with the plan.



Process Tip!

Responsibilities are available on four Plan types: Child Safety Plan, YDC Safety Plan, Custodial Permanency Plan, and Non-Custodial Permanency Plan.



System Tip!

The **Responsibilities** List View displays the following columns: **Responsibility ID**, **Responsibility Details**, **Participant Type**, **Responsible Case Person**, **Generic Responsible Person**, **Completed**, **Priority**, **Start Date**, and **Expected Completion Date**. Click the **Responsibility ID** hyperlink to open an existing record.

Task 2: Create a New Responsibility Record

Kevin Carter must provide weekly IL mentorship for Michael and attend all **IL Transition Plan** meetings as part of the Custodial Permanency Plan for Michael. You need to create a new Responsibility record and assign it to Kevin Carter as the responsible person.

1. Click **New** on the **Responsibilities** Related List. C-FIRST! displays the **New Responsibility** pop-up.
2. Enter *Attend weekly parenting classes at the local family resource center* in the **Responsibility Details** field.
3. Click the **Completed?** drop down and select if the responsibility is completed.
4. Enter the start date in the **Start Date** field.
5. Enter the expected completion date in the **Expected Completion Date** field.
6. Click **Next**. C-FIRST! displays the **Add Responsible Persons** screen.
7. Select the desired responsible person from the list of Plan Participants and Generic Responsible Person options.
8. Click **Save**. C-FIRST! creates a Responsibility record for each selected person and displays the **Responsibilities** List View.



System Tip!

C-FIRST! creates a separate Responsibility record for each selected person. All records share the same information entered on the **New Responsibility** pop-up.

Task 3: Review a Responsibility Detail Record

You need to review the newly created Responsibility record for Dorothy Carter and verify the record details on the **Responsibilities** screen.

1. Click the **Responsibility ID** hyperlink for the desired record on the **Responsibilities** List View. C-FIRST! displays the **Responsibilities** screen.
2. Review the **Responsibility ID** field. C-FIRST! auto generates this unique identification number.
3. Review the **Plan ID** field. C-FIRST! auto populates this value with the Plan under which the Responsibility was created.
4. Review the **Responsible Case Person** field. C-FIRST! populates this field based on the person selected on the **Add Responsible Persons** screen.
5. Review the **Completed?** field. C-FIRST! defaults this value to *No* when the record is created.
6. Review the **Responsibility Details** field for accuracy.
7. Review the **Start Date** field.
8. Review the **Expected Completion Date** field.
9. Review the **Created By** field. C-FIRST! auto populates this value with the name of the user who created the record.
10. Review the **Last Modified By** field. C-FIRST! auto populates this value with the name of the user who last updated the record.
11. Click **Save** after making any updates to editable fields. C-FIRST! displays the **Responsibilities** List View.



System Tip!

C-FIRST! defaults the **Completed?** field to *No* when a new Responsibility record is created. Update this field to *Yes* when the person responsible completes the assigned duty.

When the record is for a Generic Responsible Person instead of a Plan Participant, C-FIRST! displays the **Generic Responsible Person** field in place of the **Responsible Case Person** field. Both fields are auto populated and not editable.



Process Tip!

On a Custodial Permanency Plan or Non-Custodial Permanency Plan, the **IL Indicators** field displays when the Responsibility is added to a Permanency Plan. When the **IL Indicators** field has a value, C-FIRST! also displays the **Which Youth is the IL Indicator for?** field and requires it to be completed. The **Priority** field displays when the Participant Type of the responsible person is *Non-Guardian/Other Adult in Focus* or *Caregiver/Guardian in Focus*.

Task 4: Edit or Delete a Responsibility from the List View

Dorothy Carter has an existing Responsibility on the Custodial Permanency Plan that needs to be updated. You need to access the edit option for her Responsibility record directly from the Responsibilities List View.

1. Locate the desired Responsibility record on the **Responsibilities** List View.
2. Click the arrow icon to the far right of the Responsibility record. C-FIRST! displays a pop-up with **Edit** and **Delete** options.
3. Click **Edit** to open the record for editing.

Lesson 7: Navigating the Approval Process

C-FIRST! supports a structured approval process that allows records to be submitted for supervisory review. This lesson covers how to perform each approval action, including submitting, approving, rejecting, reassigning, and reviewing the approval history.

Learning Objectives

- Submit a case record for supervisor approval in C-FIRST!.
- Review the Approval History list view to track approval actions.

Task 1: Submit a Record for Approval

You have completed the Custodial Permanency Plan for Jaylen and Aaliyah Carter. The **Plan Status** is *Completed* and the **Approval Status** is blank. Submit the plan to your Child Program Supervisor for review.

1. Navigate to the **Custodial Permanency Plan detail screen** for the plan record.
2. Locate the **Submit for Approval** button in the top right corner of the screen.
3. Click **Submit for Approval**. C-FIRST! displays the **Submit for Supervisor Approval** pop-up.
4. Enter any relevant details in the **Comments** field.
5. Click **Submit**. C-FIRST! submits the record for approval and closes the pop-up.



System Tip!

The **Submit for Approval** button is only visible when the record meets specific conditions. For the Custodial Permanency Plan, the **Plan Status** must be *Completed* and the **Approval Status** must be blank or *Sent Back for Edits*.



Process Tip!

After submission, the record displays in the **Items to Approve** dashboard of the assigned approver. The approver can then approve, reject, or reassign the record.

Task 2: Review the Approval History

Review the approval history associated with the Custodial Permanency Plan for the Carter family to track all approval actions taken on the record.

1. Click **Approval History** from the **Related List Quick Links**. C-FIRST! displays the **Approval History** list view.
2. Review the **Step Name** field to identify the step of the approval process for each entry.
3. Review the **Date** field to identify when each approval action occurred.
4. Review the **Status** field to identify the current status of each approval step.
5. Review the **Assigned To** field to identify who the approval was assigned to.
6. Review the **Actual Approver** field to identify who performed the approval action.
7. Review the **Comments** field to read any notes added by the approver during the action.
8. Click the hyperlink in the **Step Name** column to view the details of a specific approval record.



System Tip!

All fields in the **Approval History** list view are auto populated and cannot be edited by users. The list view updates automatically when an approval, rejection, or reassignment action occurs.



Process Tip!

The **Approval History** list view provides a complete log of all approval actions on the record. Supervisors and Case

Managers can use this list view to track the progress of a record through the approval process.

Knowledge Check!

Question 1: When a Completed Custodial Permanency Plan is cloned in C-FIRST!, which Responsibilities are pre-populated on the new Plan Record?

- A. Responsibilities where the "Completed?" field is Yes from the original plan
- B. Only Responsibilities assigned to Generic Responsible Persons
- C. All Responsibilities from the original plan regardless of completion status
- D. Responsibilities where the "Completed?" field is No from the original plan

Question 2: When creating a new Child Safety Plan Record in C-FIRST!, which field is the only required field?

- A. Plan Status
- B. Case Person ID
- C. Plan Type
- D. Plan Date

Question 3: When the Plan Status of a Child Safety Plan is set to Abridged in C-FIRST!, which fields become visible and required?

- A. Abridge Reason and Abridge Notes
- B. Plan End Date and Present Parties Agree to Goals?
- C. Ratification Court Order and Plan Ratification Date
- D. Dissolution Date and Other Behaviors That Require Monitoring

Module 7: QRTP Eligibility

This module teaches learners how to complete the required steps to establish IV-E FC QRTP Eligibility for a child placed in a QRTP facility. Case Managers must ensure all required documentation is entered in C-FIRST! and all required activities are completed within 60 days of placement. Failure to complete all steps within this window will result in the child being ineligible for QRTP placement.

Module Objectives

After completing this module, you will be able to:

- Review and verify the CANS assessment tied to the QRTP Eligibility record.
- Create and verify the CFTM with QRTP-specific questions answered.
- Document Court Approval.

Lesson 1: Review the CANS Assessment

The Case Manager must ensure a CANS assessment has been completed and entered in the system. This is one of the required steps for QRTP eligibility.

Learning Objectives

- Confirm a CANS assessment has been completed and approved for the child.
- Verify the CANS record is entered and linked in C-FIRST!.

Task 1: Verify the CANS Assessment is Entered

You need to access the QRTP Eligibility record for Michael Carter to document prevention services for the family.

1. Navigate to the child's **Persons** record in C-FIRST!
2. Confirm the CANS Assessment ID is present.
3. Verify the date of the assessment occurs prior to the CFTM.
4. Review CANS Risk and CANS Service Intensity scores.
5. Confirm the Final Approval Date and Final Approval Action Status are populated.

Lesson 2: Create the Child and Family Team Meeting (CFTM)

The Case Manager must ensure a CFTM has been held and entered in C-FIRST! with the QRTP-specific questions answered. This is required before the QRTP Eligibility record will reflect eligibility.

Learning Objectives

- Create the CFTM record with all required QRTP fields completed.

Task 1: Create the CFTM record

1. From the **Child and Family Team Meetings** list view, click the **New** button. C-FIRST! opens the **New Child and Family Team Meeting** screen.
2. In the **Child and Family Team Meeting Type**, select the *CPS Initial Non-Custody* meeting type from the Available column and use the right arrow to move the selection to the Chosen column.
3. Click the **Child and Family Meeting Status** drop-down and select *Pending*. C-FIRST! records the meeting status.
4. In the **Completed Date** field, enter completion date.
5. In the **Is this a QRTP Meeting?** drop-down, select *Yes* from the drop-down.
6. Scroll to the **Meeting Details** section and enter the Purpose of the meeting and the Youth/Family Story sections.
7. Scroll to the **Agreements and Rights Explanation** section and select appropriate option for the TennCare Appeals Rights Explained field.
8. Click the **TennCare Appeal Rights Explained** section drop-down and select *Yes*.
9. Click **Save**. C-FIRST! saves the meeting record and displays it in the list view.
10. Review the **Child and Family Meeting Status** to ensure it is complete.

Lesson 3: Document Court Approval

After the CANS and CFTM are entered, the legal referral has been made, and a court hearing is held, the hearing outcome must be documented in C-FIRST!, confirming that the court approved the QRTP placement.

Learning Objectives

- Document the court hearing and confirm QRTP placement approval in C-FIRST!.

Task 1: Document Court Order Hearing Approval

1. After the court hearing is held, navigate to the child's case record in C-FIRST!.
2. Click on the **Court Orders/Hearings Related List Quick Link** and click on the **New** button to create a new Court Order/Hearing record.
3. Select the **D/N, Unruly, and Other Court Order and Hearing** radio button to create the record.
4. Enter all the mandatory fields like **Court Order Type, Hearing Type, Court State, Court Type, Date of Hearing** etc.
5. Click **Save** with the record in Pending status.
6. Click on the **Children Related List** to navigate to the children list view.
7. Click the **New Child** button to add the child onto this court order.
8. Update the **Court Order and Hearing status** to **Completed**.
9. Click **Save**.

Knowledge Check!

Question 1: Where does a user go to open the QRTP Eligibility Record?

- A. Provider Record
- B. Person Record, then Eligibility related list
- C. Service Taxonomy screen
- D. Court Order list

Module 8: Placement Management

Placement Management in C-FIRST! records all placement activity for children in DCS custody. Entry into care, placement changes, placement detail documentation, and trial home visits each require separate records linked to the case. Accurate placement records support funding eligibility and licensing compliance.

Module Objectives

After completing this module, you will be able to:

- Navigate from a case to the Custodial Placements List View.
- Create and complete a Placement Request and Change Notification record using the required fields.
- Review the Custodial Placement History and Placement Summary information.
- Create a worker notification for a custodial placement.
- Create a non-custodial placement record in the system.

Lesson 1: Understanding Placement Types

C-FIRST! supports three placement types to track the living arrangements of children: Primary Placement, Secondary Placement, and Non-Custodial Placement. Each type serves a distinct purpose and has its own navigation path within C-FIRST.

Note: Secondary placements (temporary breaks) are breaks in the primary placement. For example, if the child is hospitalized for a few days in the middle of the primary placement, they will go into a secondary placement.

Learning Objectives

- Navigate to the Custodial Placements list view from a Treatment Case record.

Task 1: Navigate to the Custodial Placements List View from a Case

Jaylen, Aaliyah, and Michael Carter, have been removed from the home and placed with their maternal grandmother, Dorothy Carter. You need to access the Custodial Placements list for the Carter Treatment Case to review placement records.

1. Navigate to the Carter#### Treatment Case record.
2. Locate the **Related List Quick Links** section on the Case record.
3. Click **Placements** from the **Related List Quick Links** section. C-FIRST! displays the **Custodial Placements** list view.
4. Review the columns displayed in the **Custodial Placements** list view: **Placement ID, Record Type, Client Name, Last Name/Organization Name, Placement Status, Placement Start Date, Placement End Date, and Match.**



System Tip!

From the **Custodial Placements** list view accessed through a Case record, you can only create a Trial Home Visit or Primary Placement record. Secondary Placement records are created from a Primary Placement record.

Lesson 2: Placement Request, Changes, and History

In C-FIRST!, users can request placement, submit a notification of placement change, and review placement history records. These functions support communication and coordination across Placement and Licensing workstreams.

Learning Objectives

- Create a Placement Request.
- Create a Placement Change Notification record in C-FIRST!.
- Review Custodial Placement History on a Placement record.
- View the Placement Summary for a child from the Person Type Client record.
- Create a Worker Notification for a Custodial Placement.

Task 1: Create a Placement Request

A Placement Request needs to be submitted before Jaylen and Aaliyah Carter are placed with Dorothy Carter.

1. Log in as Placement Invoicing Worker or Placement Invoicing Supervisor and click the **Placement Actions** hyperlink from the **Related List Quick Links** section. C-FIRST! displays the **Placement Actions** list view.
2. Click on **Placement Actions** in the **Related List Quick Links** section on the Case page.
3. Click the **New** button on the **Placement Actions List View** screen.
4. Select the **Placement Request** radio button from the list of choices.
5. Click the **Next** button to move to the next screen.
6. Select the child's name in the **Case Person** field by searching for them.
7. Enter the reason for the placement in the **Reason for Placement** box.
8. Select the type of placement you are asking for in the **Requested Placement Type** field.
9. Select the earliest date and time the child can be placed in the **Earliest Available Date/Time** field.
10. Type a phone number where someone can be reached in the **Contact Phone Number** field.
11. Click the **Save** button when you are done filling in the form.
12. Click **Submit for Approval** when you are ready for your supervisor to review the request.

Task 2: Create a Placement Change Notification Record

Michael Carter is currently placed with Dorothy Carter. Due to a change in circumstances, a Placement Change Notification must be submitted to the Network Development team for Michael Carter.

1. Navigate to the desired case record. C-FIRST! displays the case record.
2. Click the **Placement Actions** hyperlink from the **Related List Quick Links** section. C-FIRST! displays the **Placement Actions** list view.

3. Review the list of Placement Action records, including the **Record ID, Record Type, Person Name, Intake Status,** and **Request Status** columns.
4. Click **New**. C-FIRST! displays the **New Placement Action** pop-up.
5. Click the **Placement Change Notification** radio button. C-FIRST! highlights the selected option.
6. Click **Next**. C-FIRST! displays the **New Placement Change Notification** pop-up.



System Tip!

The **Placement Actions** list view also displays the **Intake Worker, Placement Specialist, Earliest Available Date/Time, Start Date Needed, Recommended Placement Type,** and **Disposition Outcome** columns.

When **Intake Status** is changed to *Submitted* and assigned to a Placement Invoicing Worker, then C-FIRST! worklists a Placement Record for the assigned Placement Invoicing Worker.

Task 3: Complete Placement Change Notification Fields

Complete the required fields on the Placement Change Notification for Michael Carter, including the reason for the placement change and the request details.

1. Click the **Case Person** field. Enter the name of the child.
2. Select the desired case person record from the search results. C-FIRST! populates the **Case Person** field and the auto populated fields.
3. Review the auto populated fields: **Person Name, Gender, Date of Birth, Primary Race, Ethnicity, Grade, School, Is the Child Dually Adjudicated?**, and **Is the Child ICWA Eligible?**.
4. Verify that the **Intake Status** drop-down displays *Pending* as the default value.
5. Click the **Requested Reason** drop-down. C-FIRST! displays the available options.
6. Select the applicable value for the reason for placement change. C-FIRST! populates the **Requested Reason** drop-down.
7. Click the **Earliest Available Date/Time** field. Enter the earliest date and time available for follow-up with the Intake team.
8. Enter the placement change request details in the **Request Details** field.
9. Click the **Assignee** field if a Placement Invoicing Worker assignment is needed. Enter the worker's name.
10. Select the desired user from the search results. C-FIRST! populates the **Assignee** field.
11. Click **Save**. C-FIRST! displays the **Placement Change Notification** detail screen for the newly created record.



System Tip!

C-FIRST! defaults the **Intake Status** to *Submitted* when a new Placement Change Notification record is created. Auto populated fields such as **Person Name, Gender, Date of Birth, Primary Race, Ethnicity, Grade, School, Is the Child Dually Adjudicated?**, and **Is the Child ICWA Eligible?** are read-only and pulled from the person record.



Process Tip!

After the **Intake Status** is set to *Submitted*, C-FIRST! creates a worklist item for the Placement Invoicing Worker. Users who do not hold the Placement Intake Supervisor, Placement Specialist, or Placement Supervisor role cannot edit the record after submission. The record becomes read-only for all other roles.

Task 4: Review Custodial Placement History

Review the Custodial Placement History for Jaylen Carter's Placement record to view the change history made to the Placement since its creation.

1. Navigate to the desired case record. C-FIRST! displays the case record.
2. Click the **Placements** hyperlink from the **Related List Quick Links** section. C-FIRST! displays the list of Placement records.
3. Click the desired Placement record. C-FIRST! displays the Placement record.
4. Click the **Custodial Placement History** hyperlink from the **Related List Quick Links** section. C-FIRST! displays the **Custodial Placement History** list view.
5. Review the history records, including the **Date**, **Field**, **User**, **Original Value**, and **New Value** columns.



System Tip!

C-FIRST! tracks changes to the following fields on the Placement record: **Placement Start Date**, **Placement Status**, **Placement End Date**, **End Reason**, and **Service**. All changes are recorded starting at the record's creation and include the date and time of the change, the user who made the change, and the old and new values.

Task 5: View the Placement Summary

View the Placement Summary for Jaylen Carter to review all Placement records and episodes for the child in one location.

1. Navigate to the desired person record for the child. C-FIRST! displays the person record.
2. Click the **Person Type** hyperlink from the **Related List Quick Links** section. C-FIRST! displays the **Person Type** list view.
3. Review the list of person type records, including the **Type**, **Business Email**, **Cell Number**, **Business Phone**, **Last Modified By**, and **Last Modified Date** columns.
4. Click the desired person type client record. C-FIRST! displays the person type client record.
5. Click **View Placement Summary** in the highlights panel. C-FIRST! displays the **Placement Summary** screen.
6. Review the Placement records displayed, including the **Client Name**, **Episode #**, **Placement ID**, **Case #**, **Start Date**, **End Date**, **Provider Name**, **Service**, **Discharge Reason**, **Payment Rate Type**, **Provider ID**, **Parent Org**, and **State** fields.
7. In the Person Record, click **Recalculate**, in the upper right-hand corner, if the Placement Episode data needs to be updated. C-FIRST! recalculates the **Placement Summary** with the latest placement data.



System Tip!

Placements on the **Placement Summary** screen are sorted by the **Start Date** field. All fields are auto populated from the Placement record and are read-only.



Process Tip!

Clicking **Recalculate** updates the **Placement Summary** to reflect the latest placements with a status that is not *Abridged*. C-FIRST! checks for overlapping placements and assigns them to the same episode if an overlap exists. If no overlap exists, C-FIRST! creates a new episode.

Lesson 3: Non-Custodial Placement

The Non-Custodial Placement screen captures information for situations where a child is placed in the care of an individual or entity that is outside of foster care. This is used for CPS and FSS, FCIP, Probation programs or when a child leaves custody to a relative/kinship placement. This type of placement is to show the location of the children due to Immediate Protection Agreements (IPA) and/or when the court grants custody to a relative or kin. This allows staff current or future to see where the child was last placed.

Lesson Objectives

- Create non-custodial placement.

During the initial period of the case — before the formal removal order was issued. Jaylen and Aaliyah were temporarily staying with Dorothy Carter under an Immediate Protection Agreement. Document this as a Non-Custodial Placement on Dorothy Carter's Person record.

Task 1: Create Non-Custodial Placement

1. Login as the Case Manager (assigned to the case) and from the homepage click on the **Person** tab and navigate to the desired person record.
2. Click **Person Type** from the **Related List Quick Links** and click the **Person Type Person** record.
3. Click **Placements (Person)** from the **Related Lists Quick Links** section. The Placements List View displays the list of placements created for the Person, including details such as **Placement ID, Name of Child, Proposed Caregiver Name, Placement Start Date, Placement Status, and Placement Reason**.
4. Click **New** to manually create a new Non-Custodial Placement. The **New Non-Custodial Placement** pop-up displays.
5. Click the **Address** field and enter the address of the place where the youth will be residing.
6. Click the **Placement Start Date** field and enter the start date of placement
7. Click the **Proposed Caregiver Name** and enter the name of the caregiver.

8. Based on the selected address, the **City, State, Zip Code, County, Country**, and **Zip Code** fields are auto populated.
Note: These fields can be edited manually in case the address cannot be located via the Smarty feature in the **Address** field.
9. Click **Save** to complete creating the non-custodial placement.
The non-custodial placement record is created.

Knowledge Check!

Question 1: Clicking Recalculate updates the Placement Summary to reflect the latest placements with a status that is not _____.

- A. Abridged
- B. Pending
- C. Active
- D. Complete

Question 2: Which of the following Placements is created from the Related Lists of a Primary Placement?

- A. Trial Home Placement
- B. Non-Custodial Placement
- C. Secondary Placement
- D. Youth Placement

Module 9: ICPC Requests

ICPC Requests in C-FIRST! manage the Interstate Compact on the Placement of Children process. Requests are initiated in Tennessee and routed to receiving states for home study and approval. Workers document each step from referral through placement decision, with C-FIRST! tracking timelines and status updates.

Module Objectives

After completing this module, you will be able to:

- Initiate an ICPC Request and route to a receiving state
- Track ICPC status updates and placement decisions

Dorothy Carter's sister, Ruth Carter, lives in Atlanta, Georgia, and has expressed interest in providing housing and support to Michael Carter during his transition to independent living after age 18. DCS and the family have discussed the possibility of Michael relocating to Atlanta after graduation to pursue an apprenticeship in the construction trade with Kevin Carter's professional contacts there. An outgoing ICPC request is initiated for this transition planning. Separately, a family in Virginia has been referred to Tennessee DCS for a home study related to a child connected to the Carter extended family network.

Lesson 1: Sending ICPC IC Requests

Interstate Compact on the Placement of Children (ICPC) requests enable the coordination of child placements across state lines. In C-FIRST!, users initiate outgoing ICPC requests from an existing case, complete required placement and service information, and submit the request for review by an ICPC Administrator.

Learning Objectives

- Navigate to the IC Request List View from an open case in C-FIRST!.
- Create a new ICPC IC Request Send and enter general request information.
- Complete service request, home study, financial/medical, and regulation confirmation sections based on placement criteria.
- Submit an ICPC IC Request Send for approval and identify the resulting system behavior.

Task 1: Access the IC Request List View from a Case

Because the child will be placed across state lines with Ruth Carter, you must initiate an outgoing ICPC request from the open case in C-FIRST!.

1. Log in as the ICPC Case Manager and navigate to the open case for Michael Carter####. C-FIRST! displays the case record.
2. Scroll to the **Related Lists Quick Links** section on the case.
3. Click the **IC Requests** hyperlink. C-FIRST! displays the **IC Request List View** screen with all existing IC Requests associated with the case.
4. Review the **IC Request List View** screen. C-FIRST! displays columns for **IC Request ID**, **IC Request Type**, **Sending State**, **Receiving State**, **IC Request Status**, **Created Date**, and **Last Modified Date**.
5. Click **New IC Request**. C-FIRST! displays the **New IC Request** pop-up with three radio button options.
6. Click the **ICPC IC Request Send** radio button to indicate this is an outgoing ICPC request.

7. Click **Next**. C-FIRST! displays a pop-up with the **ICPC IC Request Send** fields organized into multiple sections.



System Tip!

The **New IC Request** pop-up offers three options: *ICAMA IC Request Send for outgoing ICAMA requests*, *ICPC IC Request Send for outgoing ICPC requests*, and *ICPC IC Request Receive for incoming ICPC requests from other states*.



Process Tip!

When multiple children exist on the **Persons/Organizations Involved** related list, C-FIRST! displays the oldest child's name on the IC Request List View.

Task 2: Enter General Request Information

You will now complete the **General Request Information** section for the ICPC request to place Michael Carter with Ruth Carter in Georgia.

1. Review the **Request Type** field in the **General Request Information** section. C-FIRST! auto populates this field as *IC Administrative -- ICPC* and it is read-only.
2. Review the **Compact Scenario** field. C-FIRST! auto populates this field as *Send* and it is read-only.
3. Review the **Sending State** field. C-FIRST! auto populates this field as *Tennessee* and it is read-only.
4. Click the **Receiving State** drop-down. Select *Georgia*.
5. Review the **IC Request Status** field. C-FIRST! defaults this field to *Pending* upon creation.



System Tip!

When the **IC Request Status** is *Pending* or *Returned*, all editable fields on the screen remain modifiable. When the status changes to *Submitted*, *Denied*, *Incomplete*, or *Abridged*, all fields become read-only.

Task 3: Enter Service Request Information

You will now complete the **Services Request Information** section to define the placement type, type of care, and supervision details for Michael Carter.

1. Locate the **Services Request Information** section on the screen.
2. Click the **Placement Type** drop-down. Select *Public*.
3. Review the **Priority** field. C-FIRST! defaults this field to *Routine*.
4. Click the **Intact Family Move** drop-down. Select *No*.
5. Review the **Regulation** field. C-FIRST! auto populates this field as *#2 DCS/Child Welfare/CJO* based on the selected placement criteria.
6. Click the **Supervision By** drop-down. Select *Receiving State to Arrange Supervise*.
7. Click the **Supervisory Report** drop-down. Select the applicable reporting frequency.
8. Click the **Unique Care/Service Agreement** drop-down. Select *No*.



Process Tip!

- DCS Case Managers should select *Public* when requesting a child to go to another state. Contact the ICPC unit if *Private* or *Court Jurisdiction Only (CJO)* is appropriate for the situation.
- Select *Expedited* for the Priority field only when the request is a Regulation 7 and an Expedited Order of Compliance signed by a Judge exists. When Priority is *Expedited*, the Expedited Order of Compliance field becomes required.



System Tip!

C-FIRST! determines the **Regulation** value automatically. For example, when **Intact Family Move** is *No*, **Priority** is *Routine*, **Placement Type** is *Public*, and **Type of Care** is *Relative (Non-Parent)*, C-FIRST! sets **Regulation** to *#2 DCS/Child Welfare/CJO*.

Task 4: Complete the Home Study and Financial/Medical Plan Information

Because the request for Michael Carter falls under Regulation #2 with a *Public* placement type, you must complete the **Home Study Request Information** and **Financial/Medical Plan** sections.

1. Locate the **Home Study Request Information** section on the screen.
2. Click the **Home Study Type** drop-down. Select the applicable home study type for this scenario.
3. Locate the **Financial/Medical Plan** section. C-FIRST! displays this section because the **Placement Type** is *Public* and the **Regulation** is not *#4 Residential Treatment Center*.
4. Click the **Financial Plan** drop-down. Select the applicable financial plan for this placement.
5. Click the **Medical Plan** drop-down. Select the applicable medical plan for this placement.
6. Click **Save**. C-FIRST! saves the record and displays the **ICPC IC Request Send detail screen** for the newly created IC Request.

Task 5: Submit the ICPC IC Request Send for Approval

With all required fields completed on the ICPC Request Send for Michael Carter, you will now submit the request for review and approval by the Case Supervisor and then an ICPC Administrator.

1. Verify that the **Persons/Organizations Involved** related list includes records for all required roles, including *ICPC Child*, *Financial Responsibility*, *Responsible for Planning*, *Sending Agency*, *Supervising Agency in Receiving State*, and *Parent/Relative Placement*.
2. Update the **IC Request Status** field to *Ready for Submission*.
3. Click **Submit for Approval**. C-FIRST! displays the **Submitted for Approval** comments dialog box.
4. Enter any applicable comments in the **Comments** field.
5. Click **Submit**. C-FIRST! submits the IC Request and assigns it to a queue for review by a Case Supervisor.
6. Review the **ICPC Request Status** field. C-FIRST! updates the status to *Submitted*.
7. Review the **ICPC IC Request Send detail screen**. All fields are now read-only and the **Submit for Approval** button is disabled.



Process Tip!

After submission, an ICPC Administrator reviews the request and takes one of three actions: Approve (status changes to *Completed* and a new ICPC Admin Case Send is created), Deny (status changes to *Closed*), or Return (status changes to *Returned* and fields become editable again with a 10 business day task assigned to the Case Manager).

Lesson 2: Receiving and Reviewing Requests

In C-FIRST!, the ICPC IC Request Receive workflow allows users to process incoming interstate placement requests from other states. Users create the request, review auto populated information, submit for assignment, and complete the home study response.

Learning Objectives

- Navigate to the IC Request List View from an ICPC IC Admin Case Receive.
- Create a new ICPC IC Request Receive record using the New IC Request pop up.
- Review auto populated fields on the ICPC IC Request Receive Details tab.
- Submit an ICPC IC Request Receive with Treatment Case follow-up configuration.
- Assign a Home Study Owner and update the ICPC Request Status to In Progress.
- Complete the Home Study Response tab for preliminary and final home study evaluations.

Task 1: Navigate to the IC Request List View

A family in Virginia has submitted a request through NEICE to Tennessee DCS for a home study related to Sandra Carter's former foster sibling, who is seeking placement for her child with Kevin and Sandra Carter in Knox County. Tennessee DCS receives this as an ICPC IC Request Receive.

1. From the **ICPC IC Admin Case Receive**, locate the **Related Lists Quick Links** section.
2. Click the **IC Requests** hyperlink. C-FIRST! displays the **IC Request List View**.
3. Review the list columns: **IC Request ID**, **IC Request Type**, **Sending State**, **Receiving State**, **IC Request Status**, **Created Date**, and **Last Modified Date**.



System Tip!

The IC Request List View displays all IC Requests associated with the current ICPC IC Admin Case. Each row represents a separate request record with its current status.

Task 2: Create a New ICPC IC Request Receive Record

As the ICPC staff, create a new ICPC IC Request Receive record to initiate the home study evaluation for the Sandra and Kevin Carter.

1. Click **New IC Request**. C-FIRST! displays the **New IC Request** pop-up.
2. Click the **ICPC IC Request Receive** radio button.
3. Click **Next**. C-FIRST! displays the **New ICPC IC Request Receive** pop-up with fields matching the detail screen layout.
4. Review the auto populated fields carried over from the parent **ICPC IC Admin Case Receive**.
5. Click **Save**. C-FIRST! creates the record and displays the **ICPC IC Request Receive** details screen with the **IC Request Status** defaulting to *Pending*.



Process Tip!

The **New IC Request** pop-up offers three request types: *ICAMA IC Request Send*, *ICPC IC Request Send*, and *ICPC IC Request Receive*. Select **ICPC IC Request Receive** for incoming requests from other states.



System Tip!

C-FIRST! auto populates the new record with information from the parent ICPC IC Admin Case Receive. This includes **Sending State, Receiving State, Assigned IC Admin Owner, Placement Type, Type of Care, Priority, Regulation**, and **Home Study** fields. All established individuals from the **Persons/Organizations Involved** related list also carry over.

Task 3: Review Auto Populated Fields and Submit the ICPC IC Request Receive

Review the auto populated fields on the **ICPC IC Request Received** for the Carter family and submit the request for assignment to an FCS Program Coordinator.

1. Review the **Request Type** and **Compact Scenario** fields. C-FIRST! displays the auto populated values from the parent case.
2. Review the **Sending State** and **Receiving State** fields. C-FIRST! displays the values carried over from the parent case.
3. Review the **IC Request Status** field. C-FIRST! displays *Pending* as the default value.
4. Review the **Assigned IC Admin Owner** field. C-FIRST! displays the name of the ICPC Administrator who created the request.
5. Scroll to the **Services Request Information** section.
6. Review the auto populated fields: **Placement Type**, **Type of Care**, **Priority**, **Regulation**, **Supervision By**, **Supervisory Report**, and **Unique Care/Service Agreement**.
7. Scroll to the **Home Study Requested** section. Review the **Home Study Type** and **Home Study Requested Date** fields.
8. Scroll to the **Additional Information** section.
9. Click the **Treatment Case Follow-Up** drop-down.
10. Select *New Treatment Case*. C-FIRST! displays the **Program Type** and **Assigned Case Manager** fields.
11. Click the **IC Request Status** drop-down.
12. Select *Submitted*.
13. Click **Save**. C-FIRST! saves the record, auto creates a new Treatment Case, and populates the **Related Case ID** field in the **Navigation Links** section.



System Tip!

All fields in the **Services Request Information** section are auto populated and read-only. These values originate from the parent ICPC IC Admin Case Receive.



Process Tip!

- The **Treatment Case Follow-Up** field determines how the home study connects to a Treatment Case. Selecting *New Treatment Case* creates a new Treatment Case upon submission. Selecting *Link to Existing Treatment* requires you to populate the **Existing Treatment Case ID** field instead.
- C-FIRST! automatically assigns the submitted request to a queue for further assignment to an Kinship or FCS Program Coordinator. The new Treatment Case is created and linked to the request.

Task 4: Assign a Home Study Owner and Update the Request Status

As the Kinship or FCS Program Coordinator, pick up the ICPC IC Request Receive for the Carter family from the queue. Assign a Home Study Owner to conduct the home study evaluation for Sandra and Kevin Carter and update the request status to begin the evaluation.

1. Navigate to the **ICPC IC Request Receive** details screen for the applicable record.
2. Locate the **Home Study Requested** section.
3. Enter the name of the Home Study Owner in the **Assigned Home Study Owner** field.
4. Click the **IC Request Status** drop-down.
5. Select *In Progress*.
6. Click **Save**. C-FIRST! saves the record and creates a task for the assigned Home Study Owner with a due date based on the applicable regulation.



System Tip!

The **Assigned Case Manager** field is required when the **Treatment Case Follow-Up** is set to *New Treatment Case* and the **IC Request Status** is updated to *In Progress*.



Process Tip!

C-FIRST! sets the **Home Study Evaluation** task due date based on the Regulation value. Regulation #1 (Intact Family Move) and #2 (DCS/Child Welfare/CJO) receive a 60 business day due date for the task. Regulation #7 (Expedited/Priority) receives a 20 business day due date for the task. Regulation #4 (Residential Treatment Center) and #12 (Private/Independent Adoption) receive a 3 business day due date for the task.

Task 5: Complete the Preliminary Home Study Response

As the assigned Home Study Owner, the preliminary home study evaluation for Sandra and Kevin Carter as a placement resource has been completed. Navigate to the ICPC IC Request Receive for the Carter family to record the preliminary home study response.

1. Navigate to the **ICPC IC Request Receive** details screen for the applicable record.
2. Click the **Home Study Response** tab. C-FIRST! displays the **Home Study Response Information** section.
3. Click the **Is this the Preliminary Home Study?** drop-down.
4. Select *Yes*. C-FIRST! displays the **Preliminary Home Study Response** and **Preliminary Home Study Completion Date** fields.
5. Click the **Preliminary Home Study Response** drop-down.
6. Select the applicable response value for the preliminary evaluation.
7. Enter the completion date in the **Preliminary Home Study Completion Date** field.
8. Click the **Is this the Final Home Study?** drop-down.
9. Select *No*.
10. Click the **IC Request Status** drop-down.
11. Select *Preliminary Completed*.
12. Click **Save**. C-FIRST! saves the record and sends a notification to the assigned IC Admin Owner and FCS Program Coordinator.



System Tip!

If the Preliminary Home Study Completion Date is more than 45 days after the Home Study Requested Date, C-FIRST! requires you to complete the **Over 45 Day Reason** field before saving.



Process Tip!

After saving with *Preliminary Completed* status, the Home Study Owner can navigate back to the IC Request in the future to complete the final home study evaluation. The preliminary home study response information carries over to the associated ICPC IC Admin Case Receive.

Task 6: Complete the Final Home Study Response

As the assigned Home Study Owner, the final home study evaluation for Sandra and Kevin Carter has been completed. Return to the ICPC IC Request Receive for the Carter family to record the final home study response and close out the evaluation.

1. Log in as the assigned Home Study Owner and navigate to the **ICPC IC Request Receive** details screen for the applicable record.
2. Click the **Home Study Response** tab. C-FIRST! displays the **Home Study Response Information** section with the previously saved preliminary response data.
3. Click the **Is this the Final Home Study?** drop-down.
4. Select **Yes**. C-FIRST! displays the **Final Home Study Response** and **Final Home Study Completion Date** fields.
5. Click the **Final Home Study Response** drop-down.
6. Select the applicable response value for the final evaluation.
7. Enter the completion date in the **Final Home Study Completion Date** field.
8. Click the **IC Request Status** drop-down.
9. Select *Final Completed*.
10. Click **Save**. C-FIRST! saves the record, sends a notification to the assigned IC Admin Owner and FCS Program Coordinator, and sets all fields to read-only.



System Tip!

If the **Final Home Study Completion Date** is more than 45 days after the **Home Study Requested Date**, C-FIRST! requires you to complete the **Over 45 Day Reason** field before saving.



Process Tip!

If the **Final Home Study Response** is denied, the ICPC IC Admin Case remains open for 30 business days to allow the Sending State to submit another 100A Home Study Request for reconsideration. If no transmittal is received within 30 business days, C-FIRST! will auto close the ICPC IC Admin Case.

Lesson 3: Managing Transmittals

Transmittals enable interstate communication regarding child placement requests on an ICPC IC Admin Case by the ICPC Central Office staff. You will practice creating, sending, and reviewing transmittals exchanged between states through the National Electronic Interstate Compact Enterprise (NEICE) Clearinghouse.

Learning Objectives

- Navigate to the Transmittals List View from an ICPC IC Admin Case
- Create a new transmittal and populate required fields on the Transmittals detail screen
- Complete conditionally visible fields based on the selected Transmittal Type
- Send a transmittal to the NEICE Clearinghouse and review the transaction result
- Review a transmittal received from another state

Task 1: Review the Transmittals List View

DCS initiated an ICPC request to place Michael Carter with his great aunt, Ruth Carter, who resides in Georgia. You need to review the existing transmittals on the ICPC IC Admin Case before creating a new one.

1. Navigate to the **ICPC IC Admin** Case for David Carter####. C-FIRST! displays the **ICPC IC Admin** Case.
2. Locate the **Related List Quick Links** section on the **ICPC IC Admin** Case.
3. Click the **Transmittals** hyperlink. C-FIRST! displays the **Transmittals List View**.
4. Review the list of transmittals. Each row displays the **Transmittal ID, Transmittal Type, Transmittal Status, Sending State, and Transaction Date**.
5. Click the **Transmittal ID** of an existing transmittal to open it. C-FIRST! displays the **Transmittals detail screen** for the selected record.



System Tip!

The **Transmittals List View** displays all transmittals in chronological order. You can click any **Transmittal ID** to view its details or click the **New Transmittal** button to create a new record.

Task 2: Create a New Transmittal

You need to create a new transmittal to send a status report response to Georgia regarding the placement of Michael Carter with Ruth Carter. You will populate the **General Information** fields and save the transmittal in *Draft* status.

1. Click **New Transmittal** from the **Transmittals List View**. C-FIRST! displays the **Transmittals detail screen** with the **Transmittal Status** defaulted to *Draft*.
2. Review the **Transmittal ID** field. C-FIRST! auto generates a unique identifier and displays it as read-only.
3. Review the **From** field. C-FIRST! auto populates the value as *Tennessee* and displays it as read-only.
4. Review the **To** field. C-FIRST! defaults the value to the Receiving State from the ICPC IC Admin Case based on the Compact Scenario.
5. Click the **Transmittal Type** drop-down. C-FIRST! displays the available transmittal type options.

6. Select *Status Report Response*. C-FIRST! displays the **Case Status Update** section and the **Last Progress Report Received Date** field.
7. Click the **Purpose of Transmittal** drop-down. C-FIRST! displays the available purpose options.
8. Select the applicable purpose for this transmittal.
9. Click the **Urgent Request Indicator** drop-down. C-FIRST! displays *Yes* and *No* as options.
10. Select *No*.
11. Enter the date of the last progress report in the **Last Progress Report Received Date** field.
12. Enter any additional information in the **Notes** field.



Process Tip!

Selecting a **Transmittal Type** controls which conditional fields and sections C-FIRST! displays. For example, selecting **Status Report Response** displays the **Case Status Update** section and requires the **Last Progress Report Received Date** field.

Task 3: Complete the Case Status Update Section

Because you selected *Status Report Response* as the **Transmittal Type**, C-FIRST! displays the **Case Status Update** section. You must complete these fields for the placement status of Michael Carter with Ruth Carter before sending the transmittal.

1. Locate the **Case Status Update** section on the **Transmittals detail screen**.
2. Click the **Case Status Update** drop-down. C-FIRST! displays the available case status update options.
3. Select the applicable case status update value.
4. Enter the date of the status update in the **Case Status Update Date** field.
5. Enter relevant details in the **Case Status Update Notes** field.
6. Click **Save**. C-FIRST! displays the validation message *Do you wish to proceed without sending the transmittal?* because the **Transmittal Status** is still *Draft*.

- Click to confirm and save the transmittal in *Draft* status. C-FIRST! saves the transmittal record and returns to the **Transmittals detail screen**.



System Tip!

C-FIRST! prompts the validation message when you save a transmittal in *Draft* status. This reminds you that the transmittal has not been sent to NEICE. Saving in *Draft* status allows you to add **Transmittal Persons** and **Transmittal Attachments** before sending.



Process Tip!

Before sending the transmittal, you must add at least one person to the **Transmittal Persons** related list. Adding persons and attachments is covered in separate lessons.

Task 4: Send a Transmittal to NEICE

You have completed all required fields and added at least one person to the Transmittal Persons related list for the transmittal regarding Ruth Carter. You are now ready to send the transmittal to Georgia through NEICE.

- Navigate to the **Transmittals detail screen** for the transmittal created in the previous task.
- Click the **Transmittal Status** drop-down. C-FIRST! displays the available status options.
- Select *In Progress*.
- Click **Save**. C-FIRST! triggers the interface to transmit the record to NEICE and sets all fields and related lists to read-only.
- Review the **Transmittal Status** field. C-FIRST! updates the status to *Synced with NEICE* after receiving a successful acknowledgment from NEICE.
- Locate the **NEICE Information** section on the **Transmittals detail screen**.
- Review the **NEICE Transaction ID** field. C-FIRST! auto populates this field with the unique identifier from NEICE as read-only.

Instructor note:
Demonstrate that changing the Transmittal Status to In Progress and clicking Save triggers the NEICE interface. Once C-FIRST! begins interfacing with NEICE, all fields and related lists become read-only. Walk participants through both the successful and unsuccessful transmission outcomes. In the training environment, C-FIRST! may simulate the NEICE response.

8. Review the **Transaction Date** field. C-FIRST! auto populates this field with the date of the NEICE transaction as read-only.

Task 5: Review an Unsuccessful NEICE Transaction

A transmittal sent regarding Ruth Carter was not received by NEICE. You need to review the error details on the **Transmittals detail screen** to understand the failure.

1. Navigate to the **Transmittals detail screen** for the failed transmittal. C-FIRST! displays all fields as read-only.
2. Review the **Transmittal Status** field. C-FIRST! displays the value as *Incomplete*.
3. Locate the **NEICE Information** section.
4. Review the **Error Message Received** field. C-FIRST! displays the error message returned by NEICE as read-only.



Process Tip!

When a transmittal fails, C-FIRST! generates a notification for the assigned IC Admin Owner with the subject line containing the Transmittal ID. Review the error message and coordinate with your supervisor to resolve the issue and resend the transmittal.

Task 6: Review a Received Transmittal

Georgia has sent a transmittal regarding the placement of Michael Carter with Ruth Carter. C-FIRST! received the transmittal through NEICE and generated a notification for the assigned IC Admin Owner. You need to review the received transmittal.

1. Navigate to the ICPC IC Admin Case for David Carter####.
2. Click the **Transmittals** hyperlink in the **Related List Quick Links** section. C-FIRST! displays the **Transmittals List View**.
3. Locate the transmittal with a **Transmittal Status** of *Received*.
4. Click the **Transmittal ID** for the received transmittal. C-FIRST! displays the **Transmittals detail screen** with all fields as read-only.
5. Review the **Transmittal Status** field. C-FIRST! displays the value as *Received*.
6. Review the **From** field to confirm the **Sending State**.
7. Review the **Transmittal Type** field to identify the type of communication received.
8. Locate the **NEICE Information** section. Review the **NEICE Transaction ID** and **Transaction Date** fields.
9. Review the **Notes** field for any additional information provided by the sending state.
10. Review the **Transmittal Persons** and **Transmittal Attachments** related lists for persons and documents associated with the received transmittal.



System Tip!

All fields on a received transmittal are read-only. You cannot modify information sent by another state.



Process Tip!

C-FIRST! generates a notification with the subject *New Transmittal Received* when a transmittal arrives through NEICE. Clicking the notification navigates you directly to the ICPC IC Admin Case.

Lesson 4: ICPC Case Administration

The Interstate Compact on the Placement of Children (ICPC) IC Admin Case tracks the full lifecycle of an outgoing or incoming interstate referral. The ICPC Central Office staff use the IC Admin Case to monitor home study requests, record placement decisions, and maintain compliance with ICPC regulations and timeframes.

Learning Objectives

- Access and review the auto populated fields on an ICPC IC Admin Case Send
- Update the Case Status on an ICPC IC Admin Case Send from Worklisted to Open
- Record Home Study Response information and update the Disposition Status on an ICPC IC Admin Case Send
- Access and review the auto populated fields on an ICPC IC Admin Case Receive
- Update fields and Case Status on an ICPC IC Admin Case Receive for a non-NEICE participating state

Task 1: Review the ICPC IC Admin Case Send

The **ICPC IC Request Send** for Michael Carter has been completed and approved. C-FIRST! has created an **ICPC IC Admin Case Send** to track the outgoing referral to the state where Ruth Carter resides. You will now access and review the auto populated fields on the case.

1. Click the **Cases** tab. C-FIRST! displays the **Cases** list view.
2. Locate the ICPC IC Admin Case for the Carter#### family with a Case Type of IC Administrative -- ICPC.
3. Click the **IC Admin Case ID** hyperlink for the Carter#### case. C-FIRST! displays the ICPC IC Admin Case Send on the **Case** tab.
4. Review the **IC Admin Case ID** field. C-FIRST! displays the auto generated unique identifier as read-only.
5. Review the Case Type field. C-FIRST! displays IC Administrative -- ICPC as read-only.
6. Review the **Compact Scenario** field. C-FIRST! displays *Send* as read-only.
7. Review the **Sending State** field. C-FIRST! displays *Tennessee* as read-only.

8. Review the **Receiving State** field. C-FIRST! displays the state selected during the IC Request as read-only.
9. Review the **NEICE Participant** field. C-FIRST! displays *Yes* because the receiving state participates in the National Electronic Interstate Compact Enterprise (NEICE).
10. Review the **Case Status** field. C-FIRST! displays *Worklisted* as the default status upon case creation.
11. Review the **Case Open Date** field. C-FIRST! displays the date C-FIRST! created the case as read-only.
12. Review the **Home Study Request Status** field in the **Home Study Request** section. C-FIRST! displays *Pending* as the default status upon case creation.
13. Scroll to the **Navigation Links** section. C-FIRST! displays the **Originating Case ID**, **Assigned Case Manager**, and **IC Request ID** fields, all auto populated from the ICPC IC Request Send as read-only.



System Tip!

- You can also access the **ICPC IC Admin Case Send** by navigating to the completed **ICPC IC Request Send** record and clicking the **IC Admin Case ID** hyperlink in the **Navigation Links** section. A third option is to navigate to the originating Treatment, Permanency, or Investigation Case and select the **Associated Cases** related list.
- All related documentation and attachments from the ICPC IC Request Send are automatically transferred to the ICPC IC Admin Case Send. Review the **Attachments** related list to confirm the documents carried over.



Process Tip!

When the case is created, C-FIRST! assigns it to a queue. ICPC Administrators pick up cases from the queue based on their assigned states. The Case Status remains as *Worklisted* until an ICPC Administrator selects the case and updates it.

Task 2: Review the Request Tab and Open the ICPC IC Admin Case Send

Before processing the case for Michael Carter, you will review the services request information on the **Request** tab. Then you will assign yourself as the IC Admin Owner and update the **Case Status** to begin processing the outgoing referral.

1. Click the **Request** tab. C-FIRST! displays the request information carried over from the ICPC IC Request Send.
2. Review the **Placement Type** field in the **Services Request Information** section. C-FIRST! displays the type of placement as read-only.
3. Review the **Type of Care** field. C-FIRST! displays the type of care requested for the children as read-only.
4. Review the **Priority** field. C-FIRST! displays the priority status of the request as read-only.
5. Review the **Regulation** field. C-FIRST! displays the applicable ICPC regulation as read-only.
6. Review the **Supervision By** and **Supervisory Report** fields. C-FIRST! displays who will supervise and the reporting frequency as read-only.
7. Click the **Case** tab. C-FIRST! returns to the case detail fields.
8. Click the **Assigned IC Admin Owner** field. C-FIRST! displays the user lookup.
9. Select your name from the user lookup. C-FIRST! populates the **Assigned IC Admin Owner** field with your name.
10. Click the **Case Status** drop-down. C-FIRST! displays the available status options.
11. Select *Open*. C-FIRST! populates the **Case Status** field with *Open*.
12. Click **Save**. C-FIRST! saves the record with the updated status and owner assignment.



Process Tip!

- The **Financial/Medical Plan** section and the **Expedited Placement/Regulation 2 Confirmation** section display conditionally based on the regulation and placement type selected in the ICPC IC Request Send. Not all cases will display these sections.
- After updating the **Case Status** to *Open*, the next step in the process is to generate the 100A packet and create a Home Study Request Transmittal. Transmittal creation is covered in a separate lesson.

Task 3: Review the Case After the Home Study Request Transmittal Is Sent

The Home Study Request transmittal for Michael Carter has been sent to the receiving state through NEICE. C-FIRST! has automatically updated the case. You will now review the system updates that occurred after the transmittal was sent.

1. Review the **Case Status** field. C-FIRST! displays *In Progress*, which C-FIRST! updated automatically after the transmittal was sent.
2. Review the **Home Study Request Status** field. C-FIRST! displays *Completed*, confirming the transmittal was sent to the receiving state.
3. Review the **NEICE Case ID** field. C-FIRST! displays the NEICE Case ID populated upon the transmittal.
4. Review the **Home Study Requested Date** field. C-FIRST! displays the date the transmittal was sent as read-only.



System Tip!

For receiving states that do not participate in NEICE, the ICPC Administrator must manually update the **Case Status** to *In Progress* and manually populate the **Home Study Requested Date** field.

Task 4: Record the Home Study Response on the ICPC IC Admin Case Send

The receiving state has completed the home study for Ruth Carter and sent the Home Study Response through NEICE. C-FIRST! has updated the **Case Status** to *Home Study Response Received* and auto populated the response fields. You will now review and confirm the **Home Study Response** information and update the **Disposition Status**.

1. Review the **Case Status** field. C-FIRST! displays *Home Study Response Received*, which C-FIRST! updated upon receiving the transmittal from NEICE.
2. Scroll to the **Home Study Response Information** section. C-FIRST! displays the auto populated response fields.
3. Review the **Is this the Final Home Study?** field. C-FIRST! displays *Yes* as auto populated from the transmittal.
4. Review the **Final Home Study Response** field. C-FIRST! displays the response status from the receiving state as read-only.
5. Review the **Final Home Study Completion Date** field. C-FIRST! displays the date the receiving state completed the home study as read-only.
6. Click the **Final Disposition Status** drop-down. C-FIRST! displays the available disposition options.
7. Select *Completed*. C-FIRST! populates the **Final Disposition Status** field with *Completed*.
8. Enter notes in the **Final Disposition Notes** field to document the disposition outcome.
9. Click the **Case Status** drop-down. C-FIRST! displays the available status options.
10. Select *Placement Pending*. C-FIRST! populates the **Case Status** field with *Placement Pending*.
11. Click **Save**. C-FIRST! saves the record and creates a task for the assigned Case Manager to initiate placement for the children.



System Tip!

If the **Final Home Study Completion Date** is more than 60 days past the **Home Study Requested Date**, C-FIRST! requires the **Over 60 Day Reason** field to be completed before saving.



Process Tip!

- C-FIRST! requires the **Case Status** to be updated to *Placement Pending* before saving when the **Final Disposition Status** is set to *Completed*. If you attempt to save without updating the **Case Status**, C-FIRST! displays an error message.
- After the Home Study is approved and the **Case Status** is updated to *Placement Pending*, the Case Manager initiates the placement. The ICPC Administrator then completes the **Placement Decision** section and creates a 100B Placement Decision transmittal. The transmittal process is covered in a separate lesson.

Task 5: Review the ICPC IC Admin Case Receive

The state of Virginia had submitted an incoming ICPC request to Tennessee through NEICE for a home study related to Sandra and Kevin Carter family. C-FIRST! has created an ICPC IC Admin Case Receive. You will review the auto populated fields on the incoming case.

1. Click the **Cases** tab. C-FIRST! displays the **Cases** list view.
2. Locate the incoming ICPC IC Admin Case for the Carter#### family with a **Compact Scenario** of *Receive*.
3. Click the **IC Admin Case ID** hyperlink. C-FIRST! displays the ICPC IC Admin Case Receive on the **Case** tab.
4. Review the **Case Type** field. C-FIRST! displays **IC Administrative -- ICPC** as read-only.
5. Review the **Compact Scenario** field. C-FIRST! displays *Receive* as read-only.
6. Review the **Sending State** field. C-FIRST! displays the name of the state that submitted the request as read-only.
7. Review the **NEICE Participant** field. C-FIRST! displays *Yes* as read-only.
8. Review the **Case Status** field. C-FIRST! displays *Home Study Request Received* as the default status for cases created through NEICE.
9. Review the **Case Open Date** field. C-FIRST! displays the date C-FIRST! created the case as read-only.
10. Review the **Home Study Request Status** field. C-FIRST! displays *Received* as the default status.
11. Review the **Home Study Requested Date** field. C-FIRST! displays the date the request was received from the sending state as read-only.
12. Click the **Request** tab. C-FIRST! displays the services request information auto populated from the NEICE transmittal as read-only.
13. Review the **Placement Type, Type of Care, Priority, and Regulation** fields. C-FIRST! displays the request details from the sending state as read-only.



System Tip!

For NEICE-participating states, all attachments and transmittal records from the received transmittal are automatically uploaded to the **Attachments** and **Transmittals** related lists on the ICPC IC Admin Case Receive.



Process Tip!

- For non-NEICE states, the ICPC Administrator manually creates the case from the person record via the **Cases** related list. In that scenario, the **Case Status** defaults to *Open* instead of *Home Study Request Received*, and the ICPC Administrator must manually populate the **Sending State**, **Home Study Type**, **Home Study Request Status**, and **Home Study Requested Date** fields.
- After reviewing the incoming case, the ICPC Administrator establishes individuals in the Persons/Organizations Involved related list and creates an ICPC IC Request Receive to assign the home study to an FCS Program Coordinator.

Task 6: Update the ICPC IC Admin Case Receive for a Non-NEICE State

In this training scenario, the ICPC IC Admin Case Receive for Sandra and Kevin Carter was manually created because the sending state does not participate in NEICE. The **Case Status** is currently *Open*. You will enter the required home study request fields and update the case as you process the incoming ICPC referral.

1. Click the **Cases** tab. C-FIRST! displays the **Cases** list view.
2. Locate and click the **IC Admin Case ID** hyperlink for the manually created Carter#### Receive case. C-FIRST! displays the ICPC IC Admin Case Receive on the **Case** tab.
3. Review the **NEICE Participant** field. C-FIRST! displays *No*.
4. Review the **Case Status** field. C-FIRST! displays *Open* as the default for manually created cases.
5. Click the **Home Study Type** drop-down. C-FIRST! displays the available home study type options.
6. Select the applicable home study type. C-FIRST! populates the **Home Study Type** field with the selected value.
7. Click the **Home Study Request Status** drop-down. C-FIRST! displays the available status options.
8. Select *Received*. C-FIRST! populates the **Home Study Request Status** field with *Received*.
9. Enter the date the home study request was received from the sending state in the **Home Study Requested Date** field.
10. Click the **Request** tab. C-FIRST! displays the services request information fields as editable for non-NEICE cases.
11. Click the **Placement Type** drop-down in the **Services Request Information** section. C-FIRST! displays the available placement type options.
12. Select the applicable placement type based on the documents received from the sending state. C-FIRST! populates the **Placement Type** field.
13. Complete the remaining required fields: **Type of Care**, **Priority**, **Intact Family Move**, **Supervision By**, **Supervisory Report**, and **Unique Care/Service Agreement** using the information provided by the sending state.

14. Click **Save**. C-FIRST! validates all required fields and saves the record.



System Tip!

If the **Priority** is set to *Expedited*, C-FIRST! displays the **Expedited Order of Compliance** field, which is required on save. If the **Type of Care** is set to *Adoptive Home*, C-FIRST! displays the **Adoption To Be Finalized In** field, which is also required on save.



Process Tip!

After saving, the ICPC Administrator creates an ICPC IC Request Receive to submit the home study to an FCS Program Coordinator. Once the IC Request is submitted, C-FIRST! automatically updates the **Case Status** to *In Progress* and populates the **IC Request ID** in the **Navigation Links** section.

Lesson 5: ICPC Progress Reports

Progress Reports document the status and well-being of children placed in Tennessee through the Interstate Compact for the Placement of Children (ICPC). These reports capture the child's current circumstances, educational progress, health status, and recommendations for ongoing care.

Learning Objectives

- Access the Progress Reports list view from an ICPC IC Admin Case.
- Create a new Progress Report and enter report information fields.
- Document current placement status and progress assessment details on a Progress Report.
- Add a supervising worker recommendation and submit a Progress Report for approval.

Task 1: Access the Progress Reports List View

Michael Carter was placed with his great aunt, Ruth Carter, through an ICPC receive placement. The assigned Case Manager must access the Progress Reports for the Carter family's IC Admin Case to review existing reports and determine when a new report is due.

1. Navigate to the **ICPC IC Admin Case** screen for the applicable case.
2. Locate the **Related List Quick Links** section on the **ICPC IC Admin Case** screen.
3. Click the **Progress Reports** hyperlink. C-FIRST! displays the **Progress Reports** list view.



System Tip!

The Progress Reports list view displays all progress reports associated with the ICPC IC Admin Case. Use this list view to identify submitted reports and determine when new reports are due.

Task 2: Create a New Progress Report

A quarterly progress report is due for Michael Carter. The Case Manager will create a new Progress Report and enter the report information, including the child's name, caretaker Ruth Carter, contact details, and the reporting period.

1. Click **New Progress Report**. C-FIRST! displays the **New Progress Report** pop-up.
2. Click the **Report Type** drop-down. The drop-down displays the available report type values.
3. Select the applicable report type from the **Report Type** drop-down.
4. Locate the **Report Status** field. C-FIRST! defaults this field to *Worklisted* upon creation.
5. Search for and select the child in the **Case Person** field. C-FIRST! auto populates the **Date of Birth** field as read-only based on the selected person.
6. Search for and select the caretaker in the **Caretaker Name** field.
7. Verify the **Assigned Worker** field displays the correct assigned user.
8. Enter the applicable start date in the **Report Period Start Date** field.
9. Enter the applicable end date in the **Report Period End Date** field.
10. Enter the date the child was contacted in the **Contacted Date** field.
11. Click the **Location of Contact** drop-down. The drop-down displays the available contact location values.
12. Select the applicable location from the **Location of Contact** drop-down.
13. Enter any additional contact details in the **Additional Notes/Contacted Dates** field, if applicable.



System Tip!

C-FIRST! automatically populates the **Date of Birth** field based on the child selected in the **Case Person** field. This field is read-only and cannot be edited.

Task 3: Document Current Placement Status and Progress Assessment

The Case Manager must document Michael Carter's current living circumstances with Ruth Carter, his educational progress at school, health and medical status, and any unmet needs identified during the reporting period.

1. Scroll to the **Current Placement Status** section on the **Progress Report** detail screen.
2. Enter a description of the child's current living situation and circumstances in the **Current Circumstances** field.
3. Scroll to the **Progress Assessment** section.
4. Enter a description of the child's school performance in the **Education** field.
5. Enter a description of the child's health and medical status in the **Health and Medical** field.
6. Enter a description of any unmet needs identified for the child in the **Unmet Needs** field.
7. Click **Save**. C-FIRST! saves the updated progress report information.



Process Tip!

The **Current Circumstances** field should describe the child's overall adjustment to the placement, including relationships with the caretaker and household members, behavioral observations, and any changes since the last report.

Task 4: Add a Recommendation and Submit the Progress Report for Approval

The Case Manager has documented all placement and progress information for Michael Carter. The Case Manager will now enter a recommendation regarding the continuation of the placement with Ruth Carter and submit the Progress Report for supervisory approval.

1. Scroll to the **Recommendations** section on the **Progress Report** detail screen.
2. Click the **Supervising Worker's Recommendations** drop-down. The drop-down displays the available recommendation values.
3. Select the applicable recommendation from the **Supervising Worker's Recommendations** drop-down.
4. Enter the reason in the **If Other, Specify** field, if *Other* was selected as the recommendation.
5. Click **Save**. C-FIRST! saves the recommendation to the progress report.
6. Click **Submit for Approval**. C-FIRST! submits the Progress Report for approval to the assigned Case Manager's Supervisor.



Process Tip!

After the supervisor approves the Progress Report, C-FIRST! updates the **Report Status** to *Completed*. C-FIRST! then creates a task for the assigned IC Admin Owner to create a transmittal and send the Progress Report to the Sending State through NEICE. The task is due within 5 business days.



System Tip!

The **Approval History** related list on the **Progress Report** detail screen maintains a chronological record of all approval actions, including submissions, reviews, comments, and final decisions.

Knowledge Check!

Question 1: What are the three radio button options displayed in the New IC Request pop-up when you click New IC Request in C-FIRST!?

- A. ICAMA IC Request Send, ICAMA IC Request Receive, ICPC IC Request Send
- B. ICAMA IC Request Send, ICPC IC Request Send, ICPC IC Request Receive
- C. ICAMA IC Request Receive, ICPC IC Request Send, ICPC IC Request Receive
- D. ICPC IC Request Send, ICPC IC Request Receive, ICPC IC Request Transfer

Question 2: What Home Study Evaluation task due date does C-FIRST! assign when the Regulation value on an ICPC IC Request Receive is #7 Expedited/Priority?

- A. 3 business days
- B. 60 business days
- C. 45 business days
- D. 20 business days

Question 3: After an ICPC IC Request Send is submitted for approval, which action by the ICPC Administrator changes the IC Request Status to Completed and creates a new ICPC IC Admin Case Send?

- A. Approve
- B. Resubmit
- C. Deny
- D. Return

Question 4: What is the default value of the Transmittal Status field when a new transmittal is created in C-FIRST!?

- A. Submitted
- B. In Progress
- C. Draft
- D. Pending

Question 5: What notification subject line does C-FIRST! generate when a transmittal is received from another state through NEICE?

- A. New ICPC Case Assignment
- B. New Transmittal Received
- C. ICPC Home Study Request Received
- D. Interstate Compact Notification

Module 10: Incident Reporting

Incident Reporting in C-FIRST! captures reportable events involving children in DCS custody. Incidents are linked to the case and the child and require documentation of the event, notification actions, and any resulting case activity. Timely and accurate incident records support compliance with state and federal reporting requirements.

Module Objectives

After completing this module, you will be able to:

- Create an Incident Report linked to a case
- Document notification actions and follow-up case activity

Lesson 1: Create an Incident Report

Incident Reports in C-FIRST! document reportable events that may impact a child's safety or well-being during placement with a provider. Users create Incident Reports from a provider record, add youth involved, enter event details, and complete the report so that C-FIRST! can route notifications and tasks according to business rules.

Learning Objectives

- View Incident Reports
- Create a new Incident Report from a provider record in C-FIRST!
- Add youth to an Incident Report using the Youth Details related list
- Enter incident event information and complete an Incident Report
- Identify validation rules that C-FIRST! enforces when the Initial Incident Report Status is changed to Completed

Task 1: View Responders Incident Reports

1. Navigate to the **Homepage**.
2. Select **Tasks** from the drop-down list.
3. Select the drop-down arrow next to **Recently Viewed**.
4. Scroll down to **All Tasks** and select the appropriate queue you are assigned to.
5. Select the **Incident Report** hyperlink.

Task 2: Create a New Incident Report from the Incident Report tab

During Michael Carter's Custodial JJ program period, he sustained a minor injury during a supervised outdoor recreation activity at the DCS Foster home. The DCS staff evaluated and treated Michael on-site and released him without requiring hospital transport. Dorothy Carter was notified by phone within one hour.

1. Navigate to the Provider Record.
2. Click the **Incident Reports** Related List Quick Link.
3. Click **New**. C-FIRST! displays the new **Incident Report** screen.

4. Review the **Date/Time of Report** and **Time Zone Report Made** fields. C-FIRST! automatically populates these fields based on the current date, time, and the user profile's time zone.
5. Search for and select the person who reported the incident in the **Reporter Name** field. C-FIRST! populates the field with the selected person record.
6. Enter the reporter's phone number in the **Callback Number** field.
7. Enter a brief description of the incident in the **Brief Summary** field.
8. Click the **Actions Taken** field and enter the actions taken information.
9. Search for and select the placement provider in the **Provider** field (if applicable).
10. Click the **Referral Made to Hotline?** drop down field and select the appropriate answer (yes/no).
11. Select *Unplanned Medical Treatment - Injury* from the **Incident Report Type** multi-select box.
12. Select *Agency Medical Staff (eval/treated & released)* from the **Incident Report Sub-Type** multi-select box. C-FIRST! displays sub-type options based on the selected Incident Report Type.
13. Click **Save**. C-FIRST! saves the record and displays the **Incident Report Details** screen with the **Initial Incident Report Status** of *Draft*.



System Tip!

C-FIRST! automatically sets the **Initial Incident Report Status** to *Draft* when a new Incident Report is created. The user changes this field to *Completed* after entering all required information and adding at least one youth.



Process Tip!

The Incident Report Type field is a multi-select box. Users can select more than one type if the incident involves multiple reportable events. When more than one type is selected, the **List View** displays all types separated by semicolons.

Task 3: Add Youth Details to the Incident Report

With the Incident Report saved in *Draft* status, you need to add Michael Carter as the youth involved in this incident. C-FIRST! requires at least one youth on the **Youth Details** related list before the Incident Report can be completed.

1. Locate the **Related List Quick Links** section on the **Incident Report Details** screen.
2. Click the **Youth Details** hyperlink. C-FIRST! displays the **Youth Details** List View.
3. Click **New**. C-FIRST! displays the new **Youth Detail** dialog screen.
4. Search for and select the youth in the **Youth Name** field. C-FIRST! populates the field with the selected person record.
5. Review the **First Name**, **Last Name**, **Date of Birth**, **Age**, **Gender Identity/Expression**, and **Race** fields. C-FIRST! automatically populates these fields from the person record.
6. Click **Save**. C-FIRST! saves the Youth Detail record and displays the **Youth Details** List View with the new entry.



System Tip!

C-FIRST! populates the demographic fields on the Youth Detail record from the linked person record. These fields are read-only on the **Youth detail** screen. If any demographic information is incorrect, update it on the person record.



Process Tip!

Repeat this process to add additional youth if more than one child was involved in the incident. C-FIRST! requires at least one Youth Detail record before the **Initial Incident Report Status** can be changed to *Completed*.

Task 4: Enter Event Details and Complete the Incident Report

Michael Carter has been added to the **Youth Details** related list. You now need to enter the remaining event details and change the **Initial Incident Report Status** to *Completed* so that C-FIRST! can route notifications to the assigned Case Manager, Family Service Worker, and Team Leader.

1. Navigate back to the **Incident Report Details** screen and click **Edit**.
2. Scroll down to the **Incident Information** section and enter the date and time the event occurred in the **Date/Time Event Occurred** field.
3. Select the applicable time zone from the **Time Zone Event Occurred** drop-down. C-FIRST! updates the field.
4. Select the applicable location from the **Event Location** drop-down. C-FIRST! updates the field.
5. Scroll down to the **Event Details** section and enter a detailed description of the incident in the **Description of Events** field.
6. Scroll up to the **Incident Report Information** section and enter any actions taken by staff in the **Actions Taken** field.
7. Scroll down to the **Event Details** section and select the applicable value from the **Referral Made to Hotline?** drop-down. C-FIRST! updates the field.
8. Select the applicable value from the **Reported to Parent/Guardian?** drop-down. C-FIRST! updates the field.
9. Scroll up to the **Incident Report Information** section and select *Completed* from the **Initial Incident Report Status** drop-down. C-FIRST! updates the field.
10. Click **Save**. C-FIRST! validates all required fields and saves the Incident Report.
11. Review the **Response** section on the **Incident Report Details** screen. C-FIRST! displays this section after the Incident Report is completed.
12. Verify the **Final Incident Report Status** field displays *Completed*. C-FIRST! automatically sets this value for non-critical incident reports.

13. Verify the **Critical Event?** check box is not checked. C-FIRST! determines this value based on the selected Incident Report Type and Sub-Type.



System Tip!

- When the **Initial Incident Report Status** is changed to *Completed*, C-FIRST! enforces all validation rules for the selected Incident Report Type. Required fields that are left blank trigger an error message that reads: *Complete this field*.
- If there is a major injury or life threatening injury then the **“Does Injury Meet COA Reporting?”** field should be set to *Yes*.
- C-FIRST! sends notifications to the Case Manager, Family Service Worker, and Team Leader for each youth in custody on the **Youth Involved and Other Persons Involved** related lists. The notification includes the Incident Report ID and whether the incident was identified as a critical event.



Process Tip!

If C-FIRST! identifies the incident as a critical event based on business rules, C-FIRST! routes the report to the Incident Report Queue for the applicable Response Group and generates a high-priority task. Response Group users review the report and enter their response in the Response section.

Lesson 2: Incident Report Related Lists

Incident Reports in C-FIRST! include related lists that capture additional persons involved in an incident and notification details for contacts made during the reporting process. The focus of this lesson is adding records to the **Other Persons Involved** and **Notification Details** related lists.

Learning Objectives

- Add another person involved to an Incident Report in C-FIRST!.
- Add a notification detail to an Incident Report in C-FIRST!.
- Identify validation rules that apply to the Other Persons Involved and Notification Details screens.

Task 1: Add an Other Person Involved to an Incident Report

James Holloway, the recreation supervisor at the residential facility, was present and assisted Michael with the injury during the incident and must be documented as another person involved on the Incident Report.

1. Navigate to the **Incident Report** record.
2. Click the **Other Persons Involved** hyperlink in the **Related List Quick Links** section. C-FIRST! displays the **Other Persons Involved** list view.
3. Click **New**. C-FIRST! displays the **New Other Persons Involved** dialog screen.
4. Click the **Person ID** field and enter the name of the person.
5. Click the **Person Type** drop-down and select the applicable person type value.
6. Enter the last name in the **Last Name** field.
7. Enter the first name in the **First Name** field.
8. Enter the phone number in the **Phone Number** field.
9. Click the **Date of Birth Unknown?** drop-down.
10. Select **Yes**.
11. Enter the age in the **Approximate Age** field.
12. Click the **Gender** drop-down.
13. Select the applicable gender value.
14. Click **Save**. C-FIRST! saves the record and displays the **Other Persons Involved** list view.



System Tip!

- When a **Person ID** is provided, C-FIRST! auto populates the **Last Name, First Name, Date of Birth, Approximate Age, Gender, and Race** fields. These fields become read-only and cannot be edited.
- C-FIRST! also provides a **Save & New** button on the **New Other Persons Involved** dialog screen. Click **Save & New** to save the current record and immediately open a new blank record.



Process Tip!

When **Date of Birth Unknown?** is set to *No*, the **Date of Birth** field is required. When set to *Yes*, the **Approximate Age** field is required instead.

Task 2: Add a Notification Detail to an Incident Report

A phone notification was made regarding the Incident Report for Michael Carter. Michael's grandmother was contacted by phone to inform her about the incident. Document this notification in C-FIRST!.

1. Navigate to the **Incident Report** record.
2. Click the **Notification Details** hyperlink in the **Related List Quick Links** section. C-FIRST! displays the **Notification Details** list view.
3. Click **New**. C-FIRST! displays the **New Notification Details** pop-up.
4. Click the **Contact Category** drop-down.
5. Select the applicable contact category value.
6. Enter the *contact name* in the **Contact Name** field.
7. Enter the *date and time of contact* in the **Date/Time of Contact** field.
8. Click the **Contact Method** drop-down. Select *Phone*. C-FIRST! displays the **Number Called** field.
9. Enter the *phone number* in the **Number Called** field.
10. Enter any *relevant notes* in the **Contact Note** field.
11. Click **Save**. C-FIRST! saves the record and displays the **Notification Details** screen.



System Tip!

When *Phone* is selected as the **Contact Method**, the **Number Called** field displays and is required. When *Other* is selected, the **Contact Method Other** field displays and is required instead.



Process Tip!

Review the saved **Notification Details** screen to verify all fields are correct. Update any fields as needed and click **Save** to return to the **Notification Details** list view.

Knowledge Check!

Question 1: From which record type does C-FIRST! allow creation of a new Incident Report?

- A. A Placement Record
- B. A Case Record
- C. A Provider Record
- D. A Person Record

Question 2: What value does C-FIRST! automatically populate in the Initial Incident Report Status field when a new Incident Report is created?

- A. Pending
- B. Completed
- C. Open
- D. Draft

Question 3: What error message does C-FIRST! display when required fields are left blank and the user attempts to save an Incident Report with the Initial Incident Report Status changed to Completed?

- A. Complete this field
- B. This field cannot be left blank
- C. Validation error: please fill in all mandatory fields
- D. Required fields are missing

Question 4: When Phone is selected as the Contact Method on the New Notification Detail pop-up, which additional field does C-FIRST! display?

- A. Phone Type
- B. Number Called
- C. Callback Number
- D. Contact Method Other

Question 5: On the Other Persons Involved screen, when Date of Birth Unknown? is set to Yes, which field becomes required instead of Date of Birth?

- A. Approximate Age
- B. Age
- C. Gender
- D. First Name

Module 11: Document Management and Case Closure

C-FIRST! stores documents at two levels: person or case. The level a user selects determines where the document appears and who can access it.

Person-Level Documents

Attaching a document to the person record keeps it with that individual across every case they appear in. Users should store documents at the person level when the document belongs to the individual rather than to a specific case. Examples include birth certificates, identification documents, school records, and medical records.

Because person-level documents live on the person record, users must open that record separately to view them. The document does not need to be re-uploaded when the individual appears in a new case.

Case-Level Documents

Documents tied to a case or to a related object (Assessment, Court Order, Plan, Petition, or Placement) appear on the case's Attachments tab. Every worker assigned to the case can view them in one location. These documents do not follow an individual into future cases.

An important question to ask: "Is this document about the *person* or about the *case*?" A court order is case-specific. A child's immunization record is person specific.

Generating Forms

C-FIRST! includes a variety of forms that users may need to generate, complete, and distribute as part of their casework. Before learning the specific steps for each, it's important to understand that **not all forms work the same way**. The workflow you follow will depend on the type of form you're working with. At a high level, C-FIRST! forms fall into several categories:

- **System-Generated PDF Forms:** These are forms that C-FIRST! generates automatically using data already in the system.

When you print or download these forms, they come out as PDFs. They are not editable after generation. These are useful when you need a finalized, read-only document -- for example, a summary or report that pulls directly from case data.

- **Modifiable Word Forms:** Some forms generate as Word documents that you can edit before finalizing. This is important when a form requires narrative input, additional details, or customization that goes beyond what the system auto populates. After editing, the user typically saves the final version and uploads it back to the case record.
- **E-Signature Forms:** Certain forms support an electronic signature workflow, allowing users to email the form to external parties (such as parents, providers, or attorneys) for review and signature. This eliminates the need to print, physically sign, scan, and re-upload the document.
- **OCR Forms:** Some forms may arrive as scanned documents that go through Optical Character Recognition (OCR) processing, converting the scanned content into searchable, readable text within the system.
- **Manual Print-to-PDF:** In some situations, a user may need to manually print a screen or document to PDF using their browser or system print functionality, rather than relying on a system-generated output.

The steps you take to generate, edit, and distribute a form will vary based on which category it falls into. As we walk through each workflow in the lessons ahead, we'll identify which form type applies so you always know which path to follow.

C-FIRST! has the following seven categories for downloading and printing documents:

1. System Generated Form without eSignature
2. System Generated Form with eSignature
3. Manually Generated Form without both eSignature and Inputs
4. Manually Generated Form with both eSignature and Inputs
5. Manually Generated Form with Inputs and without eSignature
6. Manually Generated Form with eSignature and without Inputs
7. Download Empty Form

Module Objectives

After completing this module, you will be able to:

- Upload and categorize documents as case attachments
- Associate documents with case persons and case events
- Generating forms in C-FIRST!
- Process case closures

Lesson 1: Generating Forms in C-FIRST!

C-FIRST! provides a centralized form generation feature that allows users to select, populate, preview, and generate forms from system data. There are six form generation types, differing by format, how they are triggered, and the level of user interaction. Forms may be generated as either PDFs or Word documents. Some are blank forms available for direct manual download, while others are prefilled by the system and may be either editable or non-editable. During this lesson, you will practice the manual form generation process from selecting a form through downloading the completed document, using a Form Generation Type 3 form which is a System Prefilled PDF. It is triggered manually and allows edits, signatures, and downloads.

Lesson Objectives

- Automatic Form Generation Process
- E-sign a Form
- Manual Form Generation Process

Form Generation Type	Form Type Description	Format	Trigger	Form Generation Flow
Form Generation Type 1	Blank Form Download – Word/PDF Document	PDF	Manual	Manual - Direct Download
Form Generation Type 2	System Prefilled PDF – Non Editable	PDF	Manual	Manual - Input - Signature (Optional) - Download
Form Generation Type 3	System Prefilled PDF – Editable (Preview)	PDF	Manual	Manual - Input - Preview (Allow Edits) - Signature (Optional) - Download
Form Generation Type 4	System Prefilled PDF – Non Editable	PDF	System	System Triggered - Notification - Signature (Optional) - Download
Form Generation Type 5	System Prefilled – Word Doc	Word	System	System Triggered - Notification - Download
Form Generation Type 6	Manual - Partially Filled – Word Doc	Word	Manual	Manual - Input - Download



System Tip!

- The **Save As** field determines the download file format. Select the format based on whether the form is configured for PDF or DOCX output.
- The **Signature**, **Sequence**, **Signer**, and **Signer Email** fields are conditionally visible only when the form requires signatures. Either the **Signer** field or the **Signer Email** field must be populated for each signature line. Sequence values cannot be duplicated across signers.

Task 1: Automatic Form Generation Process

On completion of the form's trigger condition, a bell notification is triggered for relevant parties who have been defined to receive the notification.

1. Log into C-FIRST! and from the homepage click the bell (Notification) icon. The notification tray displays the notifications from the last 30 days.
2. Click the notification to navigate to the form. Alternatively, navigate to the desired Person, Assessment, or Case record.
3. Scroll to the bottom of the screen to click the **Attachments** tab.
4. The **Attachments** tab displays the list of all attachments associated with the relevant record.
5. Click on the hyperlink in the **File Name** column. The document opens in a preview format. **Note:** Previews will only be available for forms that are generated in PDF format and when the document status is *Signature Pending*.
6. Click **Save**. The file is downloaded to the user's local machine in the specified file format.

Task 2: E-sign a Form

On generating the form, the system will automatically generate and send an email to the signer.

1. Open the email and click the **link** in the email. The user will be navigated to the **Guest Portal Log In** page.
2. Click the **Enter Email** field and enter the email address.
3. Click the next **arrow**. An OTP will be sent to the guest's email inbox.
4. Click the **Enter Secret Key** field and enter the *OTP* received in the email.
5. Click the next **arrow**. The form displays.
6. Click the **E-Sign** button. The document sign screen displays.
7. Click the **Choose the File to Sign** drop-down and select the form to be signed.
8. Click the **Choose Signature Field** drop-down and select **Sign Here**.

9. Click the **Sign in the Box Below** field and select either **Draw** or **Type** button.
10. Proceed to type or sign your signature.
11. Click the **Are you sure** check box.
12. Click **Sign** to save your signature. Once all required signatures are completed, all stakeholders will receive an automated email update that all signatures have been completed.

Task 3: Manual Form Generation Process

1. Log into C-FIRST! as the **Case Manager** and from the homepage click the **Home** drop-down and select **Central Form Search**. The **Central Form Search** tab displays information about the form, such as the **Name**, **Category**, and **Sub-Category**.
2. Click the **Download** button if the form is to be downloaded as an empty template.
3. From the **Forms Templates** listed, select the radio button in the **Select** column to select a form.
4. Use the **Search** button to search for a case or person. After performing a search, users can select a record.
5. If additional related inputs are required, the relevant data displays in a list or grid format, enabling users to easily choose from the available options. Based on the form selected the following selection options are available:
 - Person Therapy
 - Case and Assessment
 - Person and Plan
 - Child and Parent
 - Interstate Compact Request
 - Background Check
 - Person and Eligibility Type etc.
6. Click **Save**.
7. The **Delivery Options** screen displays the file format of the form to be downloaded.
8. Next add the **Signers** who will be required to sign the document.

9. Click **Generate** and a confirmation message with a link to view the generated document is generated and visible in the **Attachments** tab, where it can be downloaded.

Lesson 2: Access and Manage Documents

C-FIRST! provides document management tools that allow you to upload, search, download, and maintain attachments on case records. In this lesson, you will practice the workflows for managing documents on the **Attachments** tab.

Learning Objectives

- Navigate to the Attachments tab on a case record and review the attachments list
- Upload a document to a case record using the Basic Upload pop-up
- Search for documents on the Attachments tab using metadata
- Download single and multiple documents from the Attachments tab
- View and edit an attachment record

Task 1: Access the Attachments Tab on a Case Record

Denise Carter's children have been placed with their maternal grandmother, Dorothy Carter. You need to review the documents associated with the Carter family case record.

1. Navigate to the case record. C-FIRST! displays the case record with its associated tabs.
2. Click the **Attachments** tab. C-FIRST! displays the list of all attachments associated with the case record.
3. Review the columns displayed for each attachment in the list: **File Name**, **Category**, **Sub-Category**, **Document Date**, **Graphic Content**, and **Status**.



System Tip!

- The attachments list on a case record includes all attachments associated with the Case ID, any Person ID on the Case, and any Assessment, Court Order, Appeal, Plan, Child and Family Team Meeting, Petition, or Placement associated with the case.
- C-FIRST! sorts the attachments list by created date, beginning with the most recent documents. Attachments with a **Status** of *Inactive* are hidden by default.

Task 2: Upload a Document Using Basic Upload

You received a medical report for Jaylen Carter. You need to upload this document to the Carter family Case record and associate it with the correct person.

1. Click **Basic Upload** on the **Attachments** tab. C-FIRST! displays the **Basic Upload** pop-up.
2. Review the **Document Date** field, which defaults to the current system date. Update the date if the document was created on a different date.
3. Enter a descriptive name in the **Document Name** field.
4. Click the **Document Category** drop-down. C-FIRST! displays the available category values based on the upload object.
5. Select the applicable category value.
6. Click the **Document Sub-Category** drop-down, if available for the selected category. C-FIRST! displays the sub-category values associated with the selected category. Select the applicable sub-category value.
7. Click **Upload File** to browse for a file on your computer. C-FIRST! opens the file explorer window. Locate and select the file from your computer, then confirm the selection. C-FIRST! displays the selected file name in the pop-up.
8. Click the **Person Association** multi-select box to optionally associate the document with one or more case persons. C-FIRST! displays all persons associated with the case. Select the person or persons to associate with the attachment.
9. Enter any relevant information in the **Comments** field.

10. Click **Save**. C-FIRST! creates the attachment record and returns to the **Attachments** tab, where the new file displays in the list.



Process Tip!

Associating a document to a person adds the attachment to that person's record. Do not associate documents to a person in SIU Team cases.

Task 3: Search for Documents on the Attachments Tab

You need to locate a specific document previously uploaded to the Carter family case record using the document search feature.

1. Click **Search** on the **Attachments** tab. C-FIRST! displays the **Document Search** section above the attachments list.
2. Enter a value in the **Document Name** field to search by the user-provided document name.
3. Click the **Document Category** drop-down. C-FIRST! displays the available category values.
4. Select the desired category to filter results.
5. Click the **Document Date Filter** drop-down. C-FIRST! displays the available date filter options.
6. Select the desired date filter option. The following options are available:
 - After
 - Before
 - On
 - Between
7. Enter the date in the **Document Date** field. If *Between* is selected, enter dates in both the **Document Date** and **Document Date 2** fields.
8. Click **Update**. C-FIRST! filters the attachments list based on the provided search criteria.
9. Review the filtered results in the attachments list.
10. Click **Reset** to restore the attachments list to its original view.
11. Click **Hide Search** to close the **Document Search** section. C-FIRST! collapses the search fields and restores the default attachments list.



Process Tip!

At least one search parameter is required to filter the attachments list. Click the **Search Inactive Documents?** checkbox to include documents with a **Status** of *Inactive* in the search results.



System Tip!

Selecting *Between* displays a second date field. Both the start date and end date are required when using this option.

Task 4: Download Documents from the Attachments Tab

You need to download documents from the Carter family case record for offline review, including a single file and a set of multiple files.

1. Locate the desired attachment in the attachments list on the **Attachments** tab.
2. Click **Download** for the individual attachment. C-FIRST! begins downloading the file to your computer.
3. Locate two or more attachments to download together.
4. Click the checkbox next to each attachment you want to include in the download.
5. Click **Download Files**. C-FIRST! packages the selected files into a zip file and begins the download.



System Tip!

Note: C-FIRST! Provides you with a Commercial Sexual Exploitation of a Minor (CSEM) checkbox. The CSEM box is used whenever there is a Commercial Sexual Exploitation of a Minor allegation. If the **CSEM Case** checkbox is selected on an attachment, the **Download** button and the selection checkbox for that attachment are disabled. CSEM Case files cannot be downloaded from the system. Please continue to reference your Child Welfare Policy for documents regarding CSEM.

Task 5: View and Edit an Attachment Record

You need to review the details of a document uploaded to the Carter family case record and update the comments on the attachment.

1. Click the hyperlink in the **File Name** column for the desired attachment on the **Attachments** tab. C-FIRST! displays the attachment record.
2. Review the **Document Date**, **Document Name**, and **File Name** fields at the top of the record.
3. Review the **Type** field, which indicates the source of the document upload.
4. Review the **Document Category** and **Document Sub-Category** fields.
5. Review the **Graphic Content?** checkbox and the **CSEM Case?** checkbox.
6. Review the **Status** field, which defaults to *Active* upon upload.
7. Review the **Parent Object ID** field to confirm the record to which the attachment is associated.
8. Review the **Person Association** field to confirm which case persons are linked to the attachment.
9. Update the **Comments** field with any additional information about the attachment.
10. Click **Save**. C-FIRST! saves the updates to the attachment record.

Task 6: Generate Case Print

The **Case Print** related list on the case is used to print the **Case Information** section along with related records on the case. The user has the option to select the related list on the case that needs to be printed.

1. Select the **Case Print** hyperlink from the **Related List Quick Links** to print Case Information and related records like CFTMS, Plans, and legal activities, navigate to the desired Case and List View displays details such as Case Print ID, Date and Time, Type, Create User, Requestor, and Request Reason.
2. Click **New** to create a new case print request. The **New Case Print: Case Print** pop-up displays.

3. Click the **Start Date** field and enter the date the Case Print will start pulling information.
4. Click the **End Date** field and enter the date the Case Print will end pulling information.
Note: If the user selects an object to be printed and applies a date range, then only the records on the case will print between the entered dates.
5. Click the **Request Reason** field and the reason for Case Print.
6. Click the **Requestor** field and enter the name of the requestor for the Case Print.
7. Click **Save**. The Case Print record is created. In the **Entity Selection** section, the related records on the case are displayed in Level 1; Level 2 displays the child records on the related records, and so on.
8. Click the check boxes for the related records that need to be printed. Users can also select all documents to print.
9. Click the **Generate Print** link and all the selected related records are compiled into a PDF that opens in a separate screen. **Double-click** a specific field to redact any sensitive information that needs to be hidden or should not be printed.
10. Click the **Print** hyperlink in the right-side top corner. The **Print** pop-up displays.
11. Click **More Settings** drop-down to select the **Background Graphics** check box.
12. Click **Print** to print the document with the redacted information. After a Case Print is created, the **Selected Entities** view will be displayed in a read only mode. The related records that are selected for print will be displayed as *selected* and the ones that are not selected will be displayed as *not selected*.



Process Tip!

To archive a document uploaded in error, change the **Status** field to *Inactive*. C-FIRST! then displays the **Status Justification** field, which is required before saving. Enter the reason for the status change, such as uploaded in error.

Task 7: Case Closure

Now that you've completed the modules and lessons, you are ready to close the Carter family Treatment Case. In this task, you will review the case information, enter the closure recommendation, address any validation messages, and submit the case for supervisory approval so the case can be finalized and closed. This aligns with the Treatment Case closure flow, where the worker enters the closure recommendation and the supervisor completes the final disposition to close the case.

1. On the **Case Information** tab, review and update case information as needed, and then navigate to the **Closure Recommendation** section.
2. Click the **Closure Type** drop down and select the appropriate option.
3. Enter any detailed information in the **Notes** field.
4. Click **Save**.

Note: If closure conditions are not met (completed Court Orders, Case Documentations, CFTMs, Case Conferences, Diligent Search, Discharged or Transferred Placements and Close Programs), the system displays validation messages that must be resolved before the record can be saved.

Knowledge Check!

Question 1: How does C-FIRST! sort the attachments list on a case record by default?

- A. By Document Date, beginning with the oldest documents
- B. By Document Category in alphabetical order
- C. By File Name in alphabetical order
- D. By created date, beginning with the most recent documents

Question 2: What happens when you select multiple attachments and click Download Files on the Attachments tab in C-FIRST!?

- A. C-FIRST! sends the selected files to your email address
- B. C-FIRST! merges the selected files into a single PDF document
- C. C-FIRST! packages the selected files into a zip file and begins the download
- D. C-FIRST! downloads each file individually to your computer

Question 3: What happens when the CSEM Case checkbox is selected on an attachment in C-FIRST!?

- A. The Person Association field is cleared and locked for editing
- B. The Download button and the selection checkbox for that attachment are disabled
- C. The attachment is moved to a restricted section of the Attachments tab
- D. The attachment status automatically changes to Inactive

Question 4: When you change the Status field of an attachment to Inactive in C-FIRST!, which field is displayed and required before saving?

- A. Status Justification
- B. Supervisor Approval
- C. Archive Date
- D. Inactive Reason

Question 5: Which date filter options are available in the Document Search section if 'Between' is selected on the Attachments tab in C-FIRST!?

- A. Upload Date and Modified Date
- B. Document Date and Document Date 2
- C. Created Date and Last Accessed Date
- D. Start Date and End Date

Question 6: How do you navigate to the Central Form Search screen in C-FIRST!?

- A. Select Generate Form from the Quick Actions menu
- B. Click the New Form button on the Case Record
- C. Click the Forms tab on the navigation bar
- D. Click the Home drop-down and select Central Form Search

Question 7: Which columns are displayed for each form in the list on the Central Form Search screen in C-FIRST!?

- A. Name, Category, and Sub-Category
- B. Name, Form Number, and Date Created
- C. Name, Description, and Form ID
- D. Name, Type, and Status

Question 8: What does C-FIRST! display after you click Generate on the Delivery Options screen?

- A. The Input screen to verify all entries before download
- B. A confirmation message with a link to view the generated document
- C. The document preview pop-up with the final version
- D. The Central Form Search screen with the form highlighted

Question 9: During form generation in C-FIRST!, previews are available only for forms generated in which file format?

- A. HTML
- B. CSV
- C. PDF
- D. DOCX

Question 10: Which fields in C-FIRST! are conditionally visible only when a form requires signatures?

- A. Signature, Sequence, Signer, and Signer Email
- B. Approver Name, Approval Date, and Approval Status
- C. Document Type, Document Status, and Generated By
- D. Form Category, Form Sub-Category, and Form Owner

Module 12: Youth Portal

Youth in DCS care can view their own case information and upload documents back to you through the Youth Portal. This portal is accessible to children who are considered custodial or non-custodial youth, Youth with NYTD Surveys, and adoptive children.

Module Objectives

- Enable Youth Portal access for an eligible youth from the Person record using the Enable Customer User button.
- Locate and review documents that a youth uploaded through the Youth Portal by navigating to the Related Files section on the Person record or the Attachments tab on the case record.
- Distinguish portal-uploaded documents from CCWIS-uploaded documents using the Type field (User Uploaded (Portal) vs. User Uploaded (CCWIS)).
- Verify that an NYTD survey completed by a youth through the Youth Portal displays as Completed on the Person Type record.

Lesson 1: Enable Youth Portal Access

Lesson Objectives

Three categories of youth qualify:

- Custodial or non-custodial youth age 16 and older
- Youth age 17 and older with NYTD surveys (custodial capacity)
- Youth who were adopted during their time with DCS

Adopted youth may request access after age 18. The activation steps are the same regardless of category.

Task 1: Youth Portal Access Overview

The Youth Portal is a digital platform that is designed to support youth and serves as a centralized hub for resources, tools, and services. The youth accessing the Portal by navigating to the Portal Homepage. The youth enters a Username and Password is able to access the Portal.

Task 2: Upload Documents to the Person Record for the Youth to Access

Documents you upload to a youth's Person record become available to the youth on their **Provided Documents** tab in the portal. The Independent Living Plan and Transition Plan forms are provided automatically.

1. From the Person record, navigate to the **Related Files** section.
2. Select **Basic File Upload**. The file upload dialog opens.
3. Select the file to upload from your device and complete the required fields: **Document Date**, **Document Category** and **Document Sub-Category**.
4. Select **Save**. The document is now available on the Person record and visible to the youth on their portal.

Lesson 2: Review Documents Uploaded by Youth

When a youth uploads a document through the Youth Portal, C-FIRST! creates an attachment record on the youth's active case automatically. You do not need to re-enter anything. The attachment pulls the document name, category, sub-category, and date directly from what the youth entered during upload.

Lesson Objectives

- Locate a youth-uploaded document on the person record

Task 1: Locate a Youth-Uploaded Document on the Person Record

1. Select the **Global Search** bar at the top of the screen.
2. Search for the youth using the **Person ID**. Select the *Person* name from the search results. C-FIRST! displays the Person profile record.
3. Navigate to the **Related Files** section on the Person record. Locate the newly uploaded document in the list.
4. Select the document name to open the attachment record. Review the document details.
5. Select the **Download** button to download the document to your device. Verify that the document content is correct and matches the requested document type.

Lesson 3: Verify NYTD Survey Completion

Youth age 17 and older with NYTD surveys can complete those surveys directly through the Youth Portal. You do not need to collect survey responses from the youth yourself. C-FIRST! notifies the youth automatically when a survey is ready, and the completed survey appears on the person record for you and NYTD Survey contractors to review.

Lesson Objectives

- NYTD survey notifications
- Verify NYTD survey completion in the Worker Portal

Task 1: NYTD Survey Notifications

1. When an NYTD survey is created for a youth and the status is not Completed, C-FIRST! sends two automatic notifications to the youth.
2. The NYTD Survey becomes accessible on the Youth Portal. The youth opens and completes the survey from there.
3. Confirm that the youth has a current email address on their Person record. C-FIRST! sends the survey notification to this email address.

Task 2: Verify NYTD Survey Completion in the Worker Portal

1. Select the **Global Search** bar at the top of the screen.
2. Search for the youth using the **Person ID**. Select the *Person* name from the search results. C-FIRST! displays the Person profile record.
3. Select **Related List Quick Links** to navigate to the **Person Type** record. Select the **NYTD Surveys** hyperlink. C-FIRST! displays the NYTD Survey related list.
4. Select the submitted NYTD Survey record to open the detailed view. C-FIRST! displays the completed survey details.
5. Verify that the **Status** field displays *Completed* and that all survey information is accurately captured.

Knowledge Check!

Question 1: Which Homepage section allows users to view personal details like Name, Date of Birth, Place of Birth, and Case Worker details?

- A. Services section
- B. Placements section
- C. Youth Details section
- D. Helpful Details section

Question 2: Which of the following personas can access the Youth Portal?

- A. Custodial or Non-Custodial Youth
- B. Youth with NYTD Surveys
- C. Adoptive Children
- D. All of the above

Module 13: Supervisor-Specific Functions

Supervisor-specific functions in C-FIRST! provide oversight tools beyond what frontline workers access. Supervisors approve work items, review worker caseloads, assign cases, and monitor task completion. These functions ensure supervisory accountability and support timely case progression.

Module Objectives

After completing this module, you will be able to:

- Approve submitted work items from the Items to Approve widget.
- Review and reassign worker caseloads.
- Monitor task completion across a team.
- Create and update case assignments for workers.
- Access Tableau Reports.
- Access the Programs tab and apply the Pending FSS Programs filter.

Lesson 1: Supervisor Dashboard and Widgets

Supervisors access dedicated homepage widgets to monitor worker caseloads, review pending approvals, and track task assignments. You will practice each supervisor-specific widget on the Case Management Homepage.

Learning Objectives

- Access the Case Management homepage and identify supervisor-specific widgets based on assigned role.
- Review items pending approval and take action using the Items to Approve widget.
- Monitor worker caseloads using the My Workers Case Load widget.
- Review worker task distribution using the My Workers Tasks widget.

Task 1: Access the Case Management Homepage and Identify Supervisor Widgets

As a Child Program Supervisor overseeing workers assigned to the Carter family case, you log in to C-FIRST! to review your supervisor homepage. You need to confirm the widgets available to you based on your role.

1. Login as the **Child Program Supervisor**. Click the **Home** tab. C-FIRST! displays the Case Management Homepage with widgets based on your assigned role.
2. Locate the **Items to Approve** widget on the Homepage. This widget displays a list of items assigned to you that are pending approval.
3. Locate the **My Workers Case Load** widget on the Homepage. This widget displays a bar graph of cases assigned to each worker under your supervision.
4. Locate the **My Workers Tasks** widget on the Homepage. This widget displays a bar graph of tasks assigned to each worker under your supervision.



System Tip!

C-FIRST! determines which widgets display on the Homepage based on your assigned security role. Supervisor roles see widgets such as Items to Approve, My Workers Case Load, and My Workers Tasks that are not visible to worker roles.



Process Tip!

Supervisors should review their Homepage widgets at the start of each workday to monitor caseload distribution, pending approvals, and worker task assignments.

Task 2: Review the Items to Approve Widget

A worker assigned to the Carter family Case has submitted a record for your approval. You need to review the pending items in the Items to Approve widget on your Homepage.

1. Locate the **Items to Approve** widget on the Homepage. C-FIRST! displays a list of items pending your approval, including the record name and the user who submitted each item.
2. Click the arrow on a pending item in the **Items to Approve** widget. C-FIRST! expands the item and displays action options for the selected record.
3. Click the **View All** hyperlink on the **Items to Approve** widget. C-FIRST! displays the **Items to Approve** view all screen with a list of all pending items.
4. Review the expanded list. Each record displays the related record, type, most recent approver, and date submitted.



System Tip!

The Items to Approve widget only displays items where the logged-in user is the designated approver. Items submitted by workers who do not report to you will not display in this widget.

Task 3: Approve an Item from the Items to Approve Widget

After reviewing the pending items, you determine that the record submitted for the Carter family case is ready for approval. You will approve the item from the Items to Approve widget.

1. Click the arrow on the pending item in the **Items to Approve** widget. C-FIRST! expands the item with action options.
2. Select *Approve* from the action drop-down. C-FIRST! displays the **Approve** screen with a text box for comments.
3. Enter comments in the text box on the **Approve** screen.
4. Click **Approve**. C-FIRST! approves the selected record and removes it from the **Items to Approve** widget.

Task 4: Reject an Item from the Items to Approve Widget

You receive a second submission related to the Carter family case that requires revision before approval. You will reject the item and provide comments explaining the reason.

1. Click the arrow on the pending item in the **Items to Approve** widget. C-FIRST! expands the item with action options.
2. Select *Reject* from the action drop-down. C-FIRST! displays the **Reject** screen with a text box for comments.
3. Enter comments in the text box on the **Reject** screen explaining the reason for rejection.
4. Click **Reject**. C-FIRST! rejects the selected record and removes it from the **Items to Approve** widget.

Task 5: Reassign an Approval Request from the Items to Approve Widget

A third pending item related to the Carter family Case requires review by another supervisor. You will reassign the approval request to the applicable user.

1. Click the arrow on the pending item in the **Items to Approve** widget. C-FIRST! expands the item with action options.
2. Select *Reassign* from the action drop-down. C-FIRST! displays the **Reassign Approval Request** screen.
3. Enter the name of the user in the **Reassign To** field. C-FIRST! enables the **Reassign** button once the field is complete.
4. Enter comments in the text box on the **Reassign Approval Request** screen.
5. Click **Reassign**. C-FIRST! reassigns the approval to the selected user and removes the item from your **Items to Approve** widget.



Process Tip!

Reassign approval requests when another supervisor has direct knowledge of the record or when you are unable to complete the review in a timely manner.

Task 6: Review the My Workers Case Load Widget

As a Child Program Supervisor, you need to monitor caseload distribution among your workers to identify anyone approaching or exceeding caseload standards. Workers assigned to the Carter family case are among those in your unit.

1. Locate the **My Workers Case Load** widget on the Homepage. C-FIRST! displays a bar graph with workers listed on the vertical axis and the number of assigned cases on the horizontal axis.
2. Review the bar graph to identify the case count for each worker under your supervision.
3. Click the **View Report** hyperlink in the bottom left-hand corner of the **My Workers Case Load** widget. C-FIRST! displays the **My Workers Case Load** report screen.
4. Review the report details. The report includes the caseload information and record identifiers for each worker.



System Tip!

The My Workers Case Load widget counts cases where the worker is listed as an assigned user on the case record and the logged-in supervisor is the worker's supervisor.



Process Tip!

Use this widget to identify workers who are approaching or above caseload standards. Redistribute cases as needed to maintain manageable workloads across your unit.

Task 7: Review the My Workers Tasks Widget

You also need to review the task distribution among your workers to ensure tasks related to the Carter family case and other cases are progressing on schedule.

1. Locate the **My Workers Tasks** widget on the Homepage. C-FIRST! displays a bar graph with workers listed on the vertical axis and the number of assigned tasks on the horizontal axis.

2. Review the bar graph to identify the task count for each worker under your supervision.
3. Click the **View Report** hyperlink in the bottom left-hand corner of the **My Workers Tasks** widget. C-FIRST! displays the **My Workers Tasks** report screen.
4. Review the report details. The report includes the task information and record identifiers for each worker supervised by the logged-in user.



System Tip!

The My Workers Tasks widget counts tasks where the worker is the assigned user and the logged-in supervisor is that worker's supervisor.



Process Tip!

Compare the My Workers Tasks report with the My Workers Case Load report to get a complete picture of each worker's workload across both cases and tasks.

Task 8: Review Pending FSS Programs from the Programs Tab

As a supervisor, you need to review pending FSS Programs that are awaiting assignment. The Carter family FSS Program may display in this list if it has not yet been assigned.

1. Click the **Programs** tab from the top navigation. C-FIRST! displays the **Programs** Tab List View.
2. Review the **Programs** Tab List View. The list displays columns for **Program ID**, **Case Person**, **Program Type**, **Program Status**, **Program Start Date**, and **Program End Date**.
3. Locate the filter on the **Programs** Tab List View.
4. Select the *Pending FSS Programs* filter. C-FIRST! filters the list to display records where **Program Status** is *Pending*, **Assignee** is blank, and **Program Type** is *FSS*.
5. Review the filtered list to identify FSS Programs that need an **Assignee** before activation.



System Tip!

When a Program record is assigned using the **Assignee** field from this list view, C-FIRST! automatically creates a task to remind the assigned user to complete the record.

Lesson 2: Approvals and QA Reviews

C-FIRST! supports a supervisory approval process for Case Management records. Users submit records for approval, and supervisors can approve, reject, or reassign those records while capturing comments throughout the process.

Learning Objectives

- Submit a Case Management record for supervisor approval in C-FIRST!.
- Approve a submitted record from the Items to Approve dashboard or Bell Notification.
- Reject a submitted record and provide required comments.
- Reassign a submitted record to another user.
- Review the Approval History list view for a record.

Task 1: Approve a Submitted Record

As a Child Program Supervisor, you received the Custodial Permanency Plan submission for Jaylen Carter. After reviewing the plan details, approve the record.

1. Navigate to the record from the **Items to Approve** dashboard or from the **Bell Notification** icon. C-FIRST! displays the record details.
2. Click **Approve** on the list view. C-FIRST! displays the **Approve Plan** pop-up.
3. Enter any comments in the **Comments** field to document your feedback.
4. Click **Approve** in the **Approve Plan** pop-up. C-FIRST! approves the record and updates the **Approval Status**



Process Tip!

After approval, the owner of the record receives a bell notification confirming that the record was approved. C-FIRST! also updates the **Approval History** list view with the step name, date, status, and any comments entered.

Task 2: Reject a Submitted Record

As a Child Program Supervisor, you received a Safety Plan submission for the Carter case. After reviewing the plan, return it to the caseworker for edits.

1. Navigate to the record from the **Items to Approve** dashboard or from the **Bell Notification** icon. C-FIRST! displays the record details.
2. Click **Approval History** in the **Related List Quick Links** section. C-FIRST! scrolls to the **Approval History** list view.
3. Click **Reject** on the list view. C-FIRST! displays the **Reject Plan** pop-up.
4. Enter comments in the **Comments** field explaining why the record is being returned. Comments are required for rejection.
5. Click **Reject** in the **Reject Plan** pop-up. C-FIRST! rejects the record and updates the **Approval Status**.



Process Tip!

After rejection, the record owner receives a bell notification that the record was returned. C-FIRST! also generates a task for the record owner to complete the returned record.

Task 3: Reassign a Submitted Record to Another User

As a Child Program Supervisor, you received a Custodial Permanency Plan submission for the Carter case but need another supervisor to review it. Reassign the approval to a different user.

1. Navigate to the record from the **Items to Approve** dashboard or from the **Bell Notification** icon. C-FIRST! displays the record details.
2. Click **Approval History** in the **Related List Quick Links** section. C-FIRST! scrolls to the **Approval History** list view.
3. Click **Reassign** on the list view. C-FIRST! displays the **Reassign Plan** pop-up.
4. Enter the user who will receive the approval in the **Reassign To** field. This field is required.
5. Enter comments in the **Comments** field explaining the reason for reassignment. Comments are required.
6. Click **Reassign** in the **Reassign Plan** pop-up. C-FIRST! reassigns the record to the specified user.



System Tip!

The **Reassign To** field is only visible on the **Reassign Plan** pop-up. It does not display on the Approve or Reject pop-ups.



Process Tip!

After reassignment, the new assignee receives a bell notification that the record was reassigned to them. C-FIRST! updates the **Approval History** list view with the reassignment details.

Task 4: Review the Approval History for a Record

Review the approval history for the Custodial Permanency Plan associated with the Carter case to verify past approval actions taken by supervisors.

1. Navigate to the record for which you want to review the approval history. C-FIRST! displays the record details.
2. Click **Approval History** in the **Related List Quick Links** section. C-FIRST! scrolls to the **Approval History** list view.
3. Review the **Step Name, Date, Status, Assigned To, Actual Approver**, and **Comments** columns in the **Approval History** list view.
4. Click the hyperlink in the **Step Name** column to view details for a specific approval step. C-FIRST! displays the selected approval record.



System Tip!

All fields in the **Approval History** list view are auto populated and not editable by users. The **Status** field reflects the current state of each approval step.



Process Tip!

C-FIRST! updates the **Approval History** list view each time an approval action occurs, including submissions, approvals, rejections, and reassignments.

Lesson 3: Managing Case Closures and Overrides

C-FIRST! restricts editing of completed, abridged, and closed records to users with supervisor-level roles. In this lesson, you will practice editing completed records, abridging meetings and conferences, and adding documentation to closed cases as a Child Program Supervisor.

Learning Objectives

- Edit a completed permanency plan record that is read-only for non-supervisor roles.
- Abridge a Child and Family Team Meeting record as a Child Program Supervisor.
- Add Case Documentation to a closed Treatment, Permanency, or Guardianship Case.

Task 1: Edit a Completed Permanency Plan Record

The Custodial Permanency Plan for Jaylen Carter was completed, but the Child Program Supervisor identified an error in the plan details. Because the **Plan Status** is *Completed*, C-FIRST! makes the record read only for Case Managers. As a Child Program Supervisor, you will override this restriction and correct the record.

1. Navigate to the case record for the Carter#### family.
2. Locate the permanency plan record for Jaylen Carter####.
3. Review the **Plan Status** field. C-FIRST! displays *Completed* as the current value.
4. Verify that the **Plan Start Date**, **Plan Status**, **Present Parties Agree to Goals**, and **Approver** fields are editable for your Child Program Supervisor role.
5. Review the **Plan Ratified?** field. Verify that it does not display *Yes*, which would make the entire record read-only for non-supervisor roles.
6. Enter the corrected information in the applicable fields on the Plan record.
7. Click **Save**. C-FIRST! saves the updated Plan record.



Process Tip!

For a Case Manager role, the **Plan Start Date**, **Plan Status**, **Present Parties Agree to Goals**, and **Approver** fields become read-only once the Plan Status is Completed. Only a Child Program Supervisor or above can edit them.



System Tip!

If the **Plan Status** is *Completed* or the **Ratified** field is *Yes*, the same read-only restrictions apply to non-supervisor roles in Non-Custodial Permanency Plans.

Task 2: Abridge a Child and Family Team Meeting

A scheduled Child and Family Team Meeting (CFTM) for the Carter family could not be held as planned due to a scheduling conflict. As the Child Program Supervisor, you need to update the **Child and Family Team Meeting Status** to *Abridged*. Only Child Program Supervisors and Team Coordinators can perform this action.

1. Navigate to the case record for the Carter#### family.
2. Locate the Child and Family Team Meeting record to be abridged.
3. Review the **Child and Family Team Meeting Status** field. C-FIRST! displays the current status value.
4. Click the **Child and Family Team Meeting Status** field to open the drop-down.
5. Select *Abridged* from the **Child and Family Team Meeting Status** drop-down.
6. Click the **Abridge Reason** drop down and select a reason.
7. Click the **Abridge Notes** field and enter details.
8. Click **Save**. C-FIRST! saves the record with the updated status.
9. Verify that the **Child and Family Team Meeting Status** field now displays *Abridged*.



Process Tip!

Similar abridgement rules apply to Treatment, Permanency, and Case Conferences. Only Child Program Supervisors and Team Coordinators can update the Conference Status to Abridged on those records.

Task 3: Close a Treatment Case

1. Open the Treatment Case from your **Today's Task** list by selecting the **Case ID** from your Homepage.
2. Go to the **Case Information** tab and review the case closure information.
3. Go to the **Closure Recommendation** section and review the worker's closure recommendation.
4. Scroll to the **Closure Disposition** section.
5. Enter or confirm the required fields, including **Closure Type**, **Review Date**, **Notes**, **Disposition Status** and **Final Case Disposition**.
6. Select **Close Case** from the **Final Case Disposition** drop down.
7. Make sure all closure requirements are complete before moving forward. This includes the following conditions:
 - Case Close Date must be after Case Open Date
 - Complete Court Orders
 - Complete Case Documentations
 - Discharge or Transfer Placements
 - Completed CFTMs
 - Completed Case Conferences
 - Close all Programs
 - Complete at least one Diligent Search
8. Click **Save** to close the case.
9. Confirm that the system updates the case to **Closed** and the disposition to **Completed**.



System Tip!

Only supervisor roles can see the **Complete Disposition** button.

Task 4: Add Documentation to a Closed Case

The Carter family's Treatment Case has been closed, but a late-arriving report needs to be uploaded to the case record. As a Child Program Supervisor, you have the authority to add records to the Case Documentation, Court Orders and Hearings, and Attachments related lists on closed Treatment, Permanency, and Guardianship Cases.

1. Navigate to the closed Treatment Case record for the Carter#### family.
2. Review the Case record to confirm the case is in a closed status.
3. Scroll to the **Case Documentation** related list on the case record.
4. Click **New** on the **Case Documentation** related list. C-FIRST! opens a new record form.
5. Enter the documentation details into the required fields on the form.
6. Click **Save**. C-FIRST! saves the new documentation record to the closed case.
7. Verify that the new record displays in the **Case Documentation** related list.



System Tip!

In addition to Case Documentation, supervisors can also add records to the Court Orders and Hearings and Attachments related lists on closed Treatment, Permanency, and Guardianship Cases.



Process Tip!

Business Administrators have access to restricted cases regardless of assignment status. All other supervisor roles must be assigned to the case to perform this action.

Task 5: Review Read-Only Restrictions and Error Messages

Before returning to the Carter family case, you will review the error messages and read-only behaviors that non-supervisor users encounter. Understanding these restrictions will help you support Case Managers and other staff when they report access issues.

1. Review the **Complete Disposition** button behavior. Only Child Program Supervisors, Regional Directors/Executive Directors/Assistant Commissioners, and Business Administrators can click this button without receiving an error.
2. Review the **Programs** tab visibility. C-FIRST! hides the **Programs** tab for users who are not Child Program Supervisors, Regional Directors/Executive Directors/Assistant Commissioners, or Business Administrators.
3. Review the **Documentation Status** field restriction. When this field displays *Completed*, the record becomes read-only for non-supervisor roles.
4. Review the **Diligent Search Status** field restriction. When this field displays *Completed*, the record becomes read-only for non-supervisor roles.
5. Review the **Program Status** field restriction. When this field displays *Closed*, the record becomes read-only for non-supervisor roles.
6. Review the Child Safety **Plan Status** field restriction. When this field displays *Completed*, the record becomes read-only for non-supervisor roles.
7. Review the related list restriction. When a parent record status is *Completed*, non-authorized users cannot click **New** on the record's related list without receiving an error.



System Tip!

C-FIRST! displays error messages when non-authorized users attempt restricted actions. The error messages display after the user clicks Save. Supervisors should be prepared to explain these messages to their Case Managers.

Lesson 4: Running Reports

Supervisors can run reports from homepage widgets to review caseloads, task distribution, and upcoming court hearings for the workers they supervise. Each widget provides a summary view and a detailed report accessible through the View Report hyperlink.

Learning Objectives

- Run the My Workers Case Load report from the Homepage widget.
- Run the My Workers Tasks report from the Homepage widget.
- Run the Next Court Hearing Due report from the Homepage widget.

Task 1: Run the My Workers Case Load Report

As a supervisor overseeing Case Workers handling the Carter family case, you need to review the caseload distribution across your team. You will access the My Workers Case Load report from the homepage to view how many cases each worker is assigned to.

1. Click the **Home** tab. C-FIRST! displays the Homepage with supervisor widgets.
2. Locate the **My Workers Case Load** widget on the Homepage.
3. Review the bar graph, which displays workers on the vertical axis and the number of assigned cases on the horizontal axis.
4. Click the **View Report** hyperlink in the bottom left-hand corner of the **My Workers Case Load** widget. C-FIRST! displays the **My Workers Case Load** report.
5. Review the report, which includes caseload details for each Case Worker supervised by the logged-in user.



System Tip!

C-FIRST! displays the My Workers Case Load widget as a bar graph. Each bar represents a worker under the logged-in supervisor and the count of cases assigned to that worker.



Process Tip!

C-FIRST! includes cases where the worker is added as a Primary Assigned Worker or Secondary Assigned Worker on the case. Supervisors can use this report to identify workers approaching or exceeding caseload standards.

Task 2: Run the My Workers Tasks Report

You need to review the task distribution for workers handling cases, including the Carter family case. You will access the My Workers Tasks report to view the number of tasks assigned to each Case Worker on your team.

1. Locate the **My Workers Tasks** widget on the Homepage.
2. Review the bar graph, which displays workers on the vertical axis and the number of assigned tasks on the horizontal axis.
3. Click the **View Report** hyperlink in the bottom left-hand corner of the **My Workers Tasks** widget. C-FIRST! displays the **My Workers Tasks** report.
4. Review the report, which includes task details for each Case Worker supervised by the logged-in user.



System Tip!

C-FIRST! displays the My Workers Tasks widget as a bar graph. Each bar represents a worker and the count of tasks assigned to that worker. Only tasks assigned to workers whose supervisor is the logged-in user are included.



Process Tip!

Supervisors can use this report to monitor task distribution and identify workers with a high number of pending or overdue tasks. Compare this report with the My Workers Case Load report to get a complete picture of worker workload.

Task 3: Run the Next Court Hearing Due Report

With the Carter family case progressing through court proceedings, you need to review upcoming court hearings across your caseload. You will access the Next Court Hearing Due report to view hearings due within 7, 30, or 90 days.

1. Locate the **Next Court Hearing Due** widget on the Homepage.
2. Review the bar graph, which displays the count of court hearings split by hearings within 7 days, 30 days, or 90 days.
3. Click the **View Report** hyperlink in the bottom left-hand corner of the **Next Court Hearing Due** widget. C-FIRST! displays the **Next Court Hearing Due** report.
4. Review the report, which displays a count of court orders assigned to the logged-in user within the 7-day, 30-day, and 90-day time frames.



System Tip!

C-FIRST! only considers the Next Hearing Date from completed court orders. Court Order status must be Completed for hearings to display on this widget.



Process Tip!

C-FIRST! includes court orders where the logged-in user is the owner or the supervisor of the owner. Supervisors can use this report to monitor upcoming statutory deadlines and ensure staff are prepared for hearings.

Lesson 5: Access Tableau

As a supervisor, you have access to certain reports within Tableau. The Tableau Homepage has a list of reports with the respective categories and links to access them.



Each report has the following navigation functionalities:

1. Navigation links to access the Homepage, Info Page, and Help.
2. Indicates the time the report was last refreshed with the Data Warehouse.
3. Filters to slice and dice the data. These filters vary with each report.
4. The **Reset** button helps reset the filters to their default values. The **Reset** button will not change any date filters on the report.
5. The **Download Excel** button enables you to download an Excel version of the report.

We'll highlight Filtering and Downloading in our next two tasks.

Learning Objectives

- Accessing Tableau Reports.
- Filtering Reports.
- Downloading Reports.

Task 1: Accessing Tableau Reports

Tableau will be accessible from your Homepage. It is highly recommended to access C-FIRST! using the Google Chrome browser.

Note: To access Tableau, you need to be either on the state network or be connected to the VPN.

1. To log in to Tableau, enter your Username and Password which would be the same as your state login credentials.
2. The **Home** screen of the main C-FIRST! Reports Homepage lists all reports with the respective categories and links to access them.
 - The **Home Screen** icon helps navigate to the Homepage.
 - The **Info** icon navigates you to the **Information** page which contains details about each report.
 - The **Help** icon opens up a ribbon as well as a Mailto link to contact Tableau admin for any issues.
 - The **Filter** option filters out reports by the respective categories.
 - The **Link** beside each report navigates you to that specific report.

Report Category	Serial Num.	Report Category	Report Name	Report Description	Report Link
☒ (All)	1	Regional Operations	Non-Custody Open Case Age	The Non-Custody Open/Case Age report is designed to provide a compreh...	Link
☒ Bias Analysis	2	Regional Operations	Administrative Review Consultation	The Administrative Review/Consultation report is designed to track time...	Link
☒ Bias Analysis (CP)	3	Regional Operations	Resource Linkage Time Open	The Resource Linkage Time Open report is designed to assess the numb...	Link
☒ Bias Analysis (OCS)	4	Regional Operations	Case Load Report	The Case Load report is designed to monitor and track caseload and metr...	Link
☒ Data Quality	5	Statewide Services	CFTM Report	The Child and Family Team Meeting (CFTM) report is designed to monitor...	Link
☒ Fiscal	6	Regional Operations	Activity Management	The Activity Management report is designed to capture caseload caps, a...	Link
☒ Health & Education	7	Regional Operations	Diversion Report	The Diversion report is a comprehensive tool designed to capture and mo...	Link
☒ ICPC	8	Legal	Legal Status Report	The Legal Status report is designed to list all legal petitions within the sy...	Link
☒ Independent Living	9	Regional Operations	FSS/FCIP Time Open	The FSS/FCIP Time Open report is designed to track the timeliness of Fa...	Link
☒ Juvenile Justice	10	Regional Operations	Diligent Search Report	The Diligent Search report is designed to capture and track the diligent s...	Link
☒ Legal	11	Regional Operations	Parent Child Visit Summary and Detail Report	The Parent Child Visit Summary and Detail report is designed to capture ...	Link
☒ Placement	12	Statewide Services	Date Needed NOA (Notice of Action)	The Date Needed NOA (Notice of Action) Report is designed to provide a ...	Link
☒ Quality Compliance	13	ICPC	ICPC Referral Date Submission Timeliness Report	The ICPC Progress report is designed to monitor the progress of ICPC pla...	Link
☒ Regional Operations	14	Statewide Services	Foster Home Mega	The Foster Home Mega report is essential for federal reporting and outli...	Link
☒ Statewide Services	15	Statewide Services	Foster Home Visit	The Foster Home Visit report is used to monitor that face-to-face contact...	Link
	16	Statewide Services	Relative Caregiver Program Detail	The Relative Caregiver Program Detail report is designed to track and m...	Link
	17	Data Quality	Data Inconsistency	The Data Inconsistency report is designed to identify, monitor, and resol...	Link
	18	Independent Living	Credit Check	The Credit Check report is designed to track the status of credit checks f...	Link
	19	Regional Operations	Collateral Contacts Report	The Collateral Contacts report is designed to monitor and track all childr...	Link
	20	Regional Operations	Entry and Exit Custody (Exit) Report	The Entry and Exits Custody (Exit) report is designed to track and monito...	Link
	21	Regional Operations	Trial Home Visit Report	The Trial Home Visit report is designed to monitor and track all the youth...	Link
	22	Juvenile Justice	Wilder Monthly RCM Contacts Report	The Wilder Monthly RCM Contacts report is designed to track all the youth...	Link
	23	Regional Operations	Runaway Report	The Runaway report is designed to track and monitor youth who are and ...	Link
	24	Regional Operations	Monthly Detention Report	The Monthly Detention report is designed to monitor and track all the yo...	Link
	25	Regional Operations	Recidivism Repeat Cases	The Recidivism/Repeat Cases report is designed to provide a comprehen...	Link
	26	Regional Operations	Safety FAST Report	The Safety/FAST report is designed to track the submission and approval...	Link
	27	Regional Operations	Timely Case Recordings Report	The Timely Case Recordings report is designed to capture the timely entr...	Link
	28	Regional Operations	Override Decision Report	The Override Decision report is designed to track overrides made on inta...	Link
	29	Placement	Active Placement List	The Active Placement List report is designed to provide a detailed view o...	Link
	30	Placement	Placement Stability Report	The Placement stability report is designed to track the stability of place...	Link
	31	Placement	Timeliness of Placement Change Reporting	The Timeliness of Placement Change Reporting report is designed to trac...	Link
	32	Placement	Waiting List Report	The Waiting List report is designed to monitor children on the waiting lis...	Link
	33	Placement	Current Census Availability	The Current Census/Availability report is designed to provide a detailed...	Link

Note: To log out of Tableau, click the **Profile** icon in the upper-right corner and select the **Sign Out** link located with the **Profile** drop-down menu.

Task 2: Filtering a Report

Each report has the following filtering functionalities:

1. The user can select any of the filters on the left side of the report to see the values present in the data for that specific field. For example, in the screenshot below we see the following regions that are present in the data for the Intake Report.
2. A user will have the ability to select one or more filters and be able to filter the entire dashboard specific to the select filtering criteria. For example, in the screenshot below, the report is only showing *Midwest Region Intakes* since we have only selected to filter by that.

Region	Supervisor	Initial Intake Worker	Intake Worker Disposition Track	Intake Worker Disposition Priority	County	ZIP Code
Midwest Region	Null	Intake Supervisor	Null	Null	Blount	Null
Midwest Region	Null	Ns2 Testuser	Null	Null	Anderson	38464
Midwest Region	Child Program Super.	Gaurav Kumar	Null	Null	Dickson	38012
Midwest Region	CPS Supervisor	Intake Supervisor	Null	Null	Bedford	Null
Midwest Region	CPS Supervisor	Intake Supervisor	Null	Null	Blount	Null
Midwest Region	Cps Supervisor	Gaurav Kumar	Null	Null	Carroll	99999
Midwest Region	Cps Supervisor	Gaurav Kumar	Null	Null	Chester	Null
Midwest Region	Cps Supervisor	Intake Supervisor	Null	Null	Benton	Null
Midwest Region	Cps Supervisor	Intake Supervisor	Null	Null	Benton	Null
Midwest Region	Cps Supervisor	Intake Supervisor	Null	Null	Chester	38464
Midwest Region	Cps Supervisor	Intake Supervisor	OUT OF STATE COURTESY	Null	Benton	Null
Midwest Region	Cps Supervisor	Intake Supervisor	SU INVESTIGATION	Null	Carroll	Null
Midwest Region	Cps Supervisor	Ns1 Testuser	Null	Null	Benton	Null
Midwest Region	Cps Supervisor	Ns1 Testuser	Null	Null	Benton	38464
Midwest Region	Cps Supervisor	Ns1 Testuser	Null	Null	Benton	38464
Midwest Region	Cps Supervisor	Ns1 Testuser	Null	Null	Benton	90543
Midwest Region	Cps Supervisor	Ns1 Testuser	Null	Null	Cheatham	38464
Midwest Region	Cps Supervisor	Ns1 Testuser	Null	PRIORITY 1	Carroll	38464
Midwest Region	Cps Supervisor	Ns1 Testuser	OUT OF STATE COURTESY	Null	Decatur	38464
Midwest Region	Cps Supervisor	Ns2 Testuser	Null	Null	Benton	Null
Midwest Region	Cps Supervisor	Ns2 Testuser	Null	Null	Benton	Null
Midwest Region	Cps Supervisor	Ns2 Testuser	Null	Null	Chester	Null
Midwest Region	Cps Supervisor 1	Intake Supervisor 1	Null	Null	Benton	Null
Midwest Region	Cps Supervisor 2	Intake Supervisor 1	Null	Null	Cheatham	Null
Midwest Region	Cps Supervisor 3	Intake Supervisor 1	Null	Null	Chester	Null

3. Another feature to note is the cascading filter functionality, meaning if you select a certain filter, the other filters will only show relevant values applicable to the already selected filter. For example, in the screenshot we can see that we selected *Midwest Region* as the **Region**, so only the counties coming under that region are displayed, as shown in the screenshot below.

Intake Report Data as of: 5/5/2026 2:04:53 PM

GLOBAL FILTERS

RESET

Start Date: 06/02/2026 End Date: 06/02/2026

Region: Midwest Region

County: (All) Anderson Bedford Benton Blount Carroll Cheatham Chester Decatur Dickson

Download Excel

Region	Supervisor	Initial Intake Worker	Intake Worker Disposition Track	Intake Worker Disposition Priority	County	ZIP Code
Midwest Region	Null	Intake Supervisor	Null	Null	Blount	Null
Midwest Region	Null	Ns2 Testuser	Null	Null	Anderson	38464
Midwest Region	Child Program Super.	Gaurav Kumar	Null	Null	Dickson	38012
Midwest Region	CPS Supervisor	Intake Supervisor	Null	Null	Bedford	Null
Midwest Region	CPS Supervisor	Intake Supervisor	Null	Null	Blount	Null
Midwest Region	Cps Supervisor	Gaurav Kumar	Null	Null	Carroll	99999
Midwest Region	Cps Supervisor	Gaurav Kumar	Null	Null	Chester	Null
Midwest Region	Cps Supervisor	Intake Supervisor	Null	Null	Benton	Null
Midwest Region	Cps Supervisor	Intake Supervisor	Null	Null	Benton	Null
Midwest Region	Cps Supervisor	Intake Supervisor	Null	Null	Chester	38464
Midwest Region	Cps Supervisor	Intake Supervisor	OUT OF STATE COURTESY	Null	Benton	Null
Midwest Region	Cps Supervisor	Intake Supervisor	SIU INVESTIGATION	Null	Carroll	Null
Midwest Region	Cps Supervisor	Ns1 Testuser	Null	Null	Benton	Null
Midwest Region	Cps Supervisor	Ns1 Testuser	Null	Null	Benton	38464
Midwest Region	Cps Supervisor	Ns1 Testuser	Null	Null	Benton	38464
Midwest Region	Cps Supervisor	Ns1 Testuser	Null	Null	Benton	96543
Midwest Region	Cps Supervisor	Ns1 Testuser	Null	Null	Cheatham	38464
Midwest Region	Cps Supervisor	Ns1 Testuser	Null	PRIORITY 1	Carroll	38464
Midwest Region	Cps Supervisor	Ns1 Testuser	OUT OF STATE COURTESY	Null	Decatur	38464
Midwest Region	Cps Supervisor	Ns2 Testuser	Null	Null	Benton	Null
Midwest Region	Cps Supervisor	Ns2 Testuser	Null	Null	Benton	Null
Midwest Region	Cps Supervisor	Ns2 Testuser	Null	Null	Chester	Null
Midwest Region	Cps Supervisor 1	Intake Supervisor 1	Null	Null	Benton	Null
Midwest Region	Cps Supervisor 2	Intake Supervisor 1	Null	Null	Cheatham	Null
Midwest Region	Cps Supervisor 3	Intake Supervisor 1	Null	Null	Chester	Null

4. Lastly, we have a reset functionality, which resets all filters, except the date filter, to their default values. This can be done by clicking the **Reset** button on top of the filters.

Task 3: Downloading a Report

Every report will have a table which can be downloaded in Excel format with all the data elements required for the report.

1. Click the **Download Excel** button.
2. Select the **Report Table** option from the pop up window.
3. Click on **Download**.

Download Crosstab

Select a sheet from this dashboard

☒ Activity Management Table

☐ Average Caseload Per Assigned Worker by Region

Select Format

☒ Excel ☐ CSV

Download

Note: The filters selected will be applied to the downloaded excel.

Lesson 6: Case Process Reviews (CPR)

C-FIRST! supports four Case Process Reviews (CPR) that need to be conducted for child welfare cases. CPRs aim to promote quality and accuracy for case management. These reviews are completed by the QA/QI staff.

Lesson Objectives

- Identify a brief overview of the Case Process Review Process.

Task 1: Case Process Reviews (CPRs) Overview

The system pulls a Random Sample Generator and assigns a sample of cases to a Supervisor. This supervisor notifies the QA/QI workers to complete the CPRs on the randomly selected cases.

The staff access the Case Details page and select Case Process Reviews hyperlink from the Related List Quicks and complete and submit the Questionnaire.

Details regarding the CPR process are covered in the QA/QI course.

Knowledge Check!

Question 1: When a supervisor rejects a submitted record in C-FIRST!, what does C-FIRST! generate for the record owner in addition to a bell notification?

- A. A new approval request sent to a Regional Director
- B. A revised duplicate of the rejected record
- C. An updated entry in the My Workers Case Load widget
- D. A task for the record owner to complete the returned record

Question 2: Which field is only visible on the Reassign Plan pop-up and does not display on the Approve or Reject pop-ups in C-FIRST!?

- A. Reassign To
- B. Comments
- C. Plan Status
- D. Approval Status

Question 3: When adding documentation to a closed Case in C-FIRST!, which Case Type does NOT allow supervisors to add records to the Case Documentation related list?

- A. Treatment Cases
- B. Adoption Cases
- C. Permanency Cases
- D. Guardianship Cases

Question 4: Which columns are displayed in the Approval History list view in C-FIRST!?

- A. Record Name, Submitted By, Date Received, and Outcome
- B. Record Type, Approver Name, Date, and Resolution
- C. Step Name, Date, Status, Assigned To, Actual Approver, and Comments
- D. Task Name, Due Date, Owner, Completion Status, and Notes

Question 5: In C-FIRST!, what must the Court Order status be for hearings to display on the Next Court Hearing Due widget?

- A. Completed
- B. Pending Review
- C. Submitted
- D. Approved

Question 6: Apart from Custody and Non-Custody CPR Record Types which are the other two Record Types that C-FIRST! supports?

- A. Investigation and Bright Futures
- B. Investigation and ICAMA
- C. ICAMA and Bright Futures
- D. FSS and Bright Futures

Glossary

This glossary defines key terms and acronyms used throughout this training module:

Term	Definition
Case Person Detail Screen	The screen name for viewing person information within a case context rather than Person detail screen.
Case Summary	The tab on a Record providing high-level overview of Case status, assessments, placements, interactions, and court orders.
Council on Accreditation (COA)	Requiring specific high-level intervention, reporting, or legal action
Commercial Sexual Exploitation of a Minor (CSEM)	This refers to Commercial Sexual Exploitation of a Minor. C-FIRST! provides you with the ability to classify documents marked with CSEM.
Comprehensive Child Welfare System (CCWIS)	This refers to DCS's modernization project for child welfare in conjunction with Deloitte.
C-FIRST!	Tennessee's CCWIS platform built on Salesforce. C-FIRST! stands for Child and Family Information Records System Tracking.
Case Process Reviews (CPR)	This refers to Case Process Reviews. These reviews are completed by the QA/QI team to promote accuracy across child welfare case management.
Homepage	The main landing page in C-FIRST! that displays widgets and other workload management tools.
List View	This refers to the standard/default list views cannot be filtered directly; must be cloned first to enable filtering controls.

Term	Definition
Navigation Bar	The horizontal menu at the top of the C-FIRST! interface with quick access to Home, Cases, Persons, Notification Bell Icon, Global Search Bar, User Profile, and Guidance Center
Personal Identification Number (PID)	Personal Identification number which is a unique identifier automatically assigned to each person record in C-FIRST!
Related List	This refers to the section on a C-FIRST! record page that displays associated like Persons Involved, Court Orders, Placements, Case Documentation, and Staff Involved.
Supporting Case Conference	This is a catch-all Case Conference type for all Case Conferences outside of a Supervisor/Worker Treatment Case Conference and a Supervisor/Worker Permanency Case Conference.
Treatment Case	The primary case management record in C-FIRST for children and families across all programs. It is used to document and manage contacts, assessments, permanency plans, meetings, placements, court activity, and other casework. It can also link to a Permanency Case while remaining the family's central record.
Worklisted	A specific record has been assigned and placed into a prioritized queue. This feature in C-FIRST! enables users to avoid manually creating certain records and to edit system-created records instead.