



C-FIRST! Training

CCWIS For Case Process Review and
Provider Monitoring & Evaluation
Learner Guide

Tennessee Department of Children's Services



Case Process Reviews and Provider Monitoring & Evaluation Course Learner Agenda

Day 1

Introduction

Lesson	Task
Introduction	• Let's Dive In • Your Role • Course Objectives • Icons Used Throughout the Course

Module 1: General Navigation

Lesson	Task
Lesson 1: Case Process Reviews and Provider Monitoring & Evaluation	• Task 1: Case Process Reviews and Provider Monitoring & Evaluation in C-FIRST!
Lesson 2: C-FIRST! Navigation	• Task 1: Case Types Overview • Task 2: Identify the Homepage and Components • Task 3: Navigate & Search for Case Information
Lesson 3: Document Management Fundamentals	• Task 1: Document Management Overview • Task 2: Upload and Download Documents
Lesson 4: Customer Service	• Task 1: Access the Customer Service Module

Morning Break

Module 2: Person Management

Lesson	Task
Lesson 1: Person Management	• Task 1: Search for Existing Person • Task 2: Perform a Search That Returns No Results • Task 3: Create a Person Type Record

Lesson	Task
	- Task 4: Generate a Person ID (PID) - Task 5: Add Person Type
Lesson 2: Searching for Provider Records	Task 1: Access Provider Search

Module 3: Case Process Reviews

Lesson	Task
Lesson 1: Generate Case Process Review Sample	- Task 1: Generate Sample - Task 2: Download File & Assign Case Reviews
Lesson 2: Complete Case Process Review	- Task 1: Search Case Process Review Assignment - Task 2: Access Case Details and Other Information - Task 3: Access the Case Process Review Tool - Task 4: Complete Case Process Review Questionnaires - Task 5: Update the Review Status
Lesson 3: Receive Case Process Review Completed Record	Task 1: Receive CPR Completed Notification & Access Case Details

Lunch

Module 4: Provider Monitoring Reviews

Lesson	Task
Lesson 1: Create a New Review	Task 1: Create New Provider Monitoring Review Record
Lesson 2: Complete Provider Monitor Reviews	- Task 1: Access your Provider Monitor Review Assignment - Task 2: Navigate to Provider Record - Task 3: Access the Provider Monitor Review Tool - Task 4: Complete Provider Review Questionnaires - Task 5: Submit Provider Monitor Review for Approval
Lesson 3: Complete Provider Monitoring & Evaluation	- Task 1: Access the Approval Notification - Task 2: Review Questionnaires - Task 3: Approve Provider Monitor Review

Module 5: Reports & Dashboards

Lesson	Task
Lesson 1: Case Process and Provider Monitoring & Evaluation Reports in C-FIRST!	• Task 1: Case Process Review (CPR) Report Overview • Task 2: Provider Monitoring & Evaluation (PME) Report Overview • Task 3: Performance Standard Report Overview
Lesson 2: Access Tableau	• Task 1: Accessing Tableau Reports • Task 2: Filtering a Report • Task 3: Downloading a Report

Wrap-Up

Table of Contents

Introduction	4
Let's Dive In	4
Your Role	4
Course Objectives	5
Icons Used Throughout the Course	5
Module 1: General Navigation.....	6
Lesson 1: Case Process Reviews & Provider Monitoring & Evaluation....	6
Task 1: Case Process Reviews & Provider Monitoring & Evaluation in C- FIRST!	6
Lesson 2: C-FIRST! Navigation	6
Task 1: Case Types Overview.....	7
Task 2: Identify the Homepage and Components	7
Task 3: Navigate & Search for Case Information	11
Lesson 3: Document Management Fundamentals	16
Task 1: Document Management Overview	16
Task 2: Upload and Download Documents	17
Lesson 4: Customer Service.....	19
Task 1: Access the Customer Service Module	19
Knowledge Check!.....	19
Module 2: Person Management.....	21
Lesson 1: Person Management.....	23
Task 1: Search for Existing Person.....	25
Task 2: Perform a Search That Returns No Results.....	25
Task 3: Create a Person Type Record.....	26
Task 4: Generate a Person ID (PID).....	27
Task 5: Add Person Type	28
Lesson 2: Searching for Provider Records.....	29
Task 1: Access Provider Search	29
Module 3: Case Process Reviews	30
Lesson 1: Generate Case Process Review Sample	30

Task 1: Generate Sample	30
Task 2: Download File & Assign Case Reviews	32
Lesson 2: Complete Case Process Review.....	33
Task 1: Search Case Process Review Assignment.....	33
Task 2: Access Case Details and Other Information.....	33
Task 3: Access the Case Process Review Tool	34
Task 4: Complete Case Process Review Questionnaires	35
Task 5: Update the Review Status.....	36
Lesson 3: Receive Case Process Review Completed Record.....	36
Task 1: Receive CPR Completed Notification & Access Case Details.....	37
Knowledge Check!.....	37
Module 4: Provider Monitoring Reviews	39
Lesson 1: Create a New Review	39
Task 1: Create New Provider Monitoring Review Record	39
Lesson 2: Complete Provider Monitor Reviews.....	40
Task 1: Access Your Provider Monitor Review Assignment.....	40
Task 2: Navigate to Provider Record	41
Task 3: Access the Provider Monitor Review Tool	41
Task 4: Complete Provider Review Questionnaires	41
Task 5: Submit Provider Monitor Review for Approval.....	42
Lesson 3: Complete Provider Monitoring & Evaluation.....	42
Task 1: Access the Approval Notification	43
Task 2: Review Questionnaires	43
Task 3: Approve Provider Monitor Review	43
Knowledge Check!.....	44
Module 5: Reports & Dashboards.....	45
Lesson 1: Case Process Reviews and Provider Monitoring & Evaluation Reports in C-FIRST!.....	45
Task 1: Case Process Review (CPR) Report Overview.....	45
Task 2: Provider Monitoring & Evaluation (PME) Report Overview.....	45
Task 3: Performance Standard Report Overview	46
Lesson 2: Access Tableau.....	46

Task 1: Accessing Tableau Reports.....	48
Task 2: Filtering a Report.....	48
Task 3: Downloading a Report	50
Knowledge Check!.....	50
Glossary.....	52

Introduction

Welcome to State of Tennessee Department of Children's Services (DCS) C-FIRST! **Case Process Reviews and Provider Monitoring & Evaluations** Course. We are excited to have you here with us! As you 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 Salesforce-based 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 is designed to provide practical end-to-end learning of fundamentals related to case process reviews and provider evaluations. C-FIRST! allows staff to conduct case process reviews, conduct provider reviews, and manage case data and information to ensure that DCS maintains state compliance and meets other quality standards.

Let's Dive In

Throughout the course, you will be guided through topics related to Case Process Reviews and Provider Monitoring & Evaluation. You will be tasked with:

1. Understanding an overview of quality related processes in the system
2. Reviewing case types, understanding basic navigation, and reviewing how to access specific information
3. Processing case and provider reviews
4. Accessing reports and dashboards

Your Role

As the **Primary Reviewer** or **Case Worker Monitor**, you are responsible for completing your quality-related tasks in a timely manner and reviewing case and provider case records accurately. In this course, we introduce you to processes that help you understand how to complete case reviews, complete provider reviews, enter customer complaints, and access reports and dashboards.

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! at a holistic level.

Course Objectives

By the end of this training, you will have hands-on experience navigating C-FIRST!, processing case and provider reviews, accessing reports and dashboards, and other related topics.

Icons Used Throughout the Course

The following icons are used throughout this 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

Child Welfare case management is dependent on accurate person, placement, provider, and eligibility information within our Child Welfare cases. This module briefly reviews concepts that you may already be familiar with. Let's take a moment to review these concepts in C-FIRST!

After completing this module, you will be able to:

- Describe case types in C-FIRST!
- Identify the **Homepage** and describe its components
- Navigate and search for case information including person, case, custody, court order, placement, and provider information
- View and upload documents

Lesson 1: Case Process Reviews & Provider Monitoring & Evaluation

This lesson provides you with an overview of the case process reviews and provider monitoring & evaluation processes in C-FIRST!, and best practices to keep in mind as you begin processing case reviews and provider reviews in the system.

Learning Objectives

- Understand quality processes in C-FIRST!
- Understand best practices

Task 1: Case Process Reviews & Provider Monitoring & Evaluation in C-FIRST!

C-FIRST! provides DCS with a comprehensive way to review cases and provider information, track quality assurance efforts, generate sample case reviews, and document safety and compliance actions.

Lesson 2: C-FIRST! Navigation

This lesson provides you with a brief overview of the **Homepage**, and how to access, navigate, and search for case information in C-FIRST!

Learning Objectives

- Identify case types in C-FIRST!
- Identify the **Homepage** and describe its components
- Navigate and search for case information including person, case, court orders, placement, and provider information

Task 1: Case Types Overview

C-FIRST! provides a comprehensive way to manage child welfare cases. Let's take a moment to review some of the case types in the system and how they compare to the case types you were previously used to.



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

Task 2: Identify the Homepage and Components

The **Homepage** for the **Case Monitor/Reviewer** role displays the following widget:

- **Today's Tasks:** This widget displays a list of active programs that are assigned to the worker and associated information like Program ID, Child Name, Program Name, Program Status, and Supervisor. The **View All** link allows users to view all the tasks.
- **Items to Approve:** This widget displays a list of the items assigned to the logged-in User. It includes information on what the item is and who submitted it for approval.
Note: The **Items to Approve** section displays for Supervisor and above roles.



Process Tip!

Check your **Homepage** at the start of each workday to identify tasks and cases requiring immediate attention.

Switch Between Tasks Views

1. On the **Tasks** list view, click the **dropdown arrow** next to the current view name.
2. Click the **dropdown arrow** and select *All Tasks*.
3. Click the **dropdown arrow** and select *Open Tasks*.
4. Click the **dropdown arrow** and select *Overdue Tasks*.
5. Click the **dropdown arrow** and select *Completed Tasks*.
6. Click the **dropdown arrow** and select *Today's Tasks*.
7. Click the **List Display** button (table icon) to change how tasks are displayed.



Process Tip!

Check the **Overdue Tasks** view daily to confirm that no critical deadlines have been missed. A case that is, missing the initial interview deadline would be flagged here.

When there is an auto-generated Contact record that is created by the system, that record appears with a status that shows "Worklisted". This essentially is a record that is pending and requires completion. Any Initial Interview contact records that are created by the system appear with a status that reflects "Worklisted". Per policy, these Initial Interviews must be completed within 10 days. If this contact is not made within 10 days, staff must update Good Faith Effort activities.

Navigate from Task to Related Case

Each task notification links to the related Case Record. This allows you to quickly navigate from the notification to the Case requiring action.

1. On the **Tasks** list view, click on the **task subject** for the Carter Case assignment. C-FIRST! opens the **Task Details** 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.
4. Review the Case information to understand what action is required. For a new Case assignment, you must review the Intake and conduct the initial interview.
5. Click the **browser back** button to return to the **Task Details** screen. C-FIRST! displays the task record.



System Tip!

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

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.

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.

Pin Default List Views

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

1. Login as the **Child Programs Case Manager**.
2. Click the **Cases** tab in the navigation bar. C-FIRST! displays the **Cases** list view.
3. Click the **dropdown 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*.
4. Locate the **Pin** button (push pin icon) next to the **View** dropdown and click the **Pin** button. C-FIRST! sets **My Primary Assigned Cases** as your default view for the **Cases** tab.
5. 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.

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, locate the **Settings** button (gear icon) on the toolbar.
2. Click the **Settings** button. C-FIRST! displays list view settings options.
3. Review available settings for column display and list behavior.
4. Click the **Select List Display** button (table icon) to switch between display formats. C-FIRST! offers alternative ways to view the list data.
5. Click the **Refresh** button (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** button after making changes to Case Records to confirm the list view displays the most current data.

Task 3: Navigate & Search for Case Information

Next, let's cover how to navigate to places in the system where you may need to review and access certain records as a part of your case review, or other tasks that you need to perform. There are multiple ways to access person, case, eligibility and other information in the system. The main thing that we want you to remember is that there is no "one" correct way, once you become familiar with the system's navigation functionality, you are on your way to becoming a navigation pro!

Navigate to Person Information

To access person records and information, use the below steps:

1. Navigate to the **Homepage** and select the Home drop-down menu. The Home Menu displays.
2. Select the **Persons** tab. The **Persons List View** displays.
3. Select the **List View** carat and select the person list view you wish to view. The **List View** displays.
4. Select the appropriate **Name** hyperlink for the person you wish to view. The **Person Details screen** displays.

Note: You also can use the **Global Search Bar** at the top of the screen, or the **Search** box to the right of the screen.

The **Person Details screen** provides you with the **Person Header** which shows you the **Date of Birth**, **Gender at Birth**, and the **Ethnicity** of the individual.

The **Related List Quick Links** gives you access to records related to Eligibility, Contact History, Assessments, Person Address, IV-E Reimbursability Tracking, Person Type, Alias/Other Name, Record Requests, Client Account Statements, Relationship, Interface Data, Moving Violations, Cases, and Eligibility Summary.

Note: In the Person Type record you can access the medical and educational records.

This page also gives you access to the **Related Files** section where you can view and upload documents to the person record.

Navigate to Case Information

To access case details and information, use the following steps:

1. Navigate to the **Homepage** and select the Home drop-down menu. The **Home Menu** displays.
2. Select the **Cases** tab. The **Cases List View** displays.
3. Select the **List View** carat and select the case type you wish to view. The List View displays.
4. Select the appropriate **Case ID** hyperlink for the case you would like to view. The **Case Details screen** displays.

Note: You also can use the **Global Search Bar** at the top of the screen, or the **Search** box to the right of the screen.

The **Case Details screen** provides you with the **Case Header** which shows you the **Case Status**, **Case Type**, and the **Assigned Worker**.

The **Related List Quick Links** gives you access to records related to Persons, Programs, Associated Cases, Case History, Assessments, Court Orders and Hearings, Placements, Case Agreements, Case Related Activities, Approval History, Assigned Users, Service Requests, and Referral for Services links.

The sub-tab provides you access to **Case Information**, **Case Summary**, **Timeline**, **Attachments**, and the **Case Person Timeline** tabs.

Navigate to Judicial Information

Judicial and court information is tracked against case records. To access court order and hearing information, use the below steps:

1. Navigate to the **Homepage** and select the Home drop-down menu. The **Home Menu** displays.
2. Select the **Cases** tab. The **Cases List View** displays.
3. Select the **List View** carat and select the case type you wish to view. The List View displays.
4. Select the appropriate **Case ID** hyperlink for the case you would like to view. The **Case Details screen** displays.
5. Select the Court Orders and Hearings hyperlink from the Related List Quick Links. The **Court Orders and Hearings** List displays.

6. Select the **Court Order/Hearing ID** hyperlink for the record you wish to view. The **Court Order/Hearing Details screen** displays.

The **Court Order/Hearing Details screen** provides you with the **Court Order/Hearing Header** which shows you the **Record Type**, **Date of Hearing**, **Court/Hearing Status**, **Court Order Type**, and the **Hearing Type**.

The **Related List Quick Links** are accessible to you based on record type.

The sub-tab provides you access to the **Details** and **Attachment** tabs.

Navigate to Placement Information

To access placement records, use the below steps:

1. Navigate to the Homepage and select the Home drop-down menu. The Home Menu displays.
2. Select the **Cases** tab. The **Cases List View** displays.
3. Select the **List View** carat and select the case type you wish to view. The **List View** displays.
4. Select the appropriate **Case ID** hyperlink for the case you would like to view. The **Case Details screen** displays.
5. Select the Placements hyperlink from the Related List Quick Links. The **Placements** List displays.
6. Select the **Placement ID** hyperlink for the record you wish to view. The **Placement Details screen** displays.

The **Placement Details screen** provides you with the **Placement Header** which shows you the End Reason, Transfer to Another Agency, Placement End Date, Case ID, and the Placement Status.

The **Related List Quick Links** gives you access to records related to Placement Versions, Placement History, Approval History, and Secondary Placement.

The sub-tab provides you access to the **Details** tab. This provides you with Child Information, Provider Information, Placement Information, Provider Service Information, Payment Information, Approval Details, Placement End information, and Navigation Links. The **Modify Placement** action button on the top displays for specific case workers based on their security access; this button allows them to edit placement information. There are two types of placement record

types: *Primary Placement* and *Trial Home Visit*. Secondary placements are included as a Related Link on the Primary Placement record.

Navigate to Provider Records

To navigate to a **Provider** record, use the **Provider** tab from the **Home Menu**.

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. Navigate to the **Provider** tab from the **Home** drop-down. The **Provider Recently Viewed** screen displays.
4. Locate any Provider and click the **Account Name** hyperlink to view the details of that Provider. The **Details** screen of the Provider record displays.
5. Observe that the **Providers List View** displays columns including:
 - Account Name
 - Region
 - Provider Types
 - Provider Type Status
 - Agreement Services
 - Provider Persons
 - Website
 - Assigned Supervisor



System Tip!

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



Process Tip!

- You can access Person records in C-FIRST! multiple different ways. Remember, you have access to the **Cases** tab, the **Person** tab, and the **Global Search Bar**. As you begin to understand navigation in the system, it will be easier to find and locate information.
- All eligibility information in C-FIRST! is maintained at a person-level, this means that to view eligibility information including the Eligibility ID, the Case ID, the Eligibility type, and documented related to the eligibility record, you must access person records in the system!

Search for an Existing Person

1. From the **Case Details** screen for the Case, click the **Persons** hyperlink in the **Related List Quick Links** section. C-FIRST! displays the **Case Persons** list.
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 **Date of Birth** field and enter *date of birth*.
6. Click the **Search** button. C-FIRST! performs the search and displays results in the **Search Results** list.
7. Review the search results. If a matching record exists, C-FIRST! displays the person's name, date of birth, and PID.

Lesson 3: Document Management Fundamentals

In this lesson, you will learn about the robust and secure document management functionality within our **C-FIRST!** solution. It supports the uploading, management, and downloading of documents so that we have the information necessary to support our staff and children in our care.

Learning Objectives

- Understand document management capabilities
- Identify how to upload or download documents

Task 1: Document Management Overview

To locate a **Provider** record and access the documents/files attached to it using the **Attachments** tab follow the steps below:

1. Navigate to the **Provider** tab from the Home drop-down. The **Provider Recently Viewed** screen displays.
2. Click the desired hyperlink on the Provider **Account Name** to navigate to the record. The **Provider** screen displays.
3. Click the **Attachments** tab. This displays the list of all files or documents associated with the corresponding record.
4. Click the desired **File Name** hyperlink to open the file and view.

**System Tip!**

Upon clicking the hyperlink, the **Attachment** record will open. From this screen, you can view and edit the attachment details, as applicable. Any edits made will be saved upon clicking the **Save**.

Task 2: Upload and Download Documents

To upload a new document to a record and download an existing document from the **Attachments** tab follow the steps below:

1. Click the **Attachments** tab of the Provider record as above.
2. Click **Basic File Upload** to upload a document, the **Upload File** pop-up displays. **Note:** Basic Upload functionality supports single document uploads.
3. Click **Document Date** field to enter the date.
4. Click **Document Category** drop-down and select from the options:
 - HART Assessment
 - Home Study Assessments and Approvals
 - Incident Report
 - Monitoring and Evaluation
 - Notifications/Notices
 - PREA
 - Performance Improvement Plan and Documentation
 - Provider Application
 - Provider Correspondence
 - Training
 - Other
5. Click **Document Sub-Category** and select from the available options.
6. Click **Upload Files** and select the appropriate file from your computer to upload. **Note:** You can also click the **Drop File** to drag and drop a file for upload.
7. Click the **Document Name** textbox to enter a filename if relevant.
8. Click **Save** to proceed, after the file is uploaded the **Related Files** list displays.
9. Click the **Download** to download a file. Once the file download is complete, you will receive a notification.

10. Click **Advance File Upload** to upload, combine and split documents. The **ImageTrust** screen displays.
11. Click **Upload All Documents** to proceed. **Note:** All files created via ImageTrust will be pdfs.

C-FIRST! Document Storage Guide

Core Record Types

C-FIRST! uses three major record types where documents can be uploaded. These are not hierarchical and operate independently.



Case

Center record of individual cases. Examples include an Investigation Case, Treatment Case (Foster Care, JJ, FSS, FCIP), Permanency Case, Adoption/SPG Case, and Bright Futures Case.



Person

Individual record that may be associated with multiple cases through the Person Record.



Provider

Separate record for providers. A Provider Record may represent a placement provider, foster parent, service provider, or similar entity.

Modules Within a Case

Documents attached to a case can be stored in specific modules of that case. Modules include, but are not limited to:

Case

Assessment	Court Hearings & Orders
Custodial Placement	Non-Custodial Placement
Appeals	Placement
CFTM	Incident Report

Modules Within a Provider Record

Provider Records store documents separately from cases. Modules include, but are not limited to:

Provider

Provider Management Action	Licensing
Provider Monitoring	Training

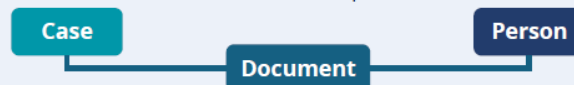
Person and Case Relationship

Documents attached to a person follow that person across all associated cases.

Person

Investigation A	Investigation B	Permanency Case	Treatment Case
Treatment Case A			

Some documents can be attached to both a case and a person.



Lesson 4: Customer Service

In this lesson, we discuss the customer service features in C-FIRST! Our customer services processes refer to complaints and inquiries that are reported to DCS by children, families, providers, caseworkers, and other individuals that are involved with our child welfare services.

Learning Objectives

- Understand how to access the Customer Service module
- Understand Customer Service module List Views
- Understand how to create a Customer Service record

Task 1: Access the Customer Service Module

To navigate to the **Customer Service** module in C-FIRST!, please complete the steps below.

1. Log in as **Central Office Staff**. The **Homepage** displays.
2. Select the **Home Menu**.
3. Select the **Customer Service** tab. The **Customer Service List View** displays.
4. Review the following information from the List View:
 - Customer Service ID
 - Status
 - Complaint Type
 - Child Name
 - Complainant Name
 - Assigned To
 - Created Date
 - Date Closed
5. Filter using the **Date Closed** column.

Knowledge Check!

Question 1: What is the name of C-FIRST!'s landing page?

- A. The Dashboard page
- B. The C-FIRST! Landing page
- C. The Homepage
- D. The TN DCS Page

Question 2: Which **Homepage** component displays tasks that are due today?

- A. Today's Tasks
- B. Items to Approve
- C. Global Search Bar
- D. Notifications & Icons

Question 3: *True or False:* The **Case Details** screen provides you with the **Case Header** which shows you the **Case Status**, **Case Type**, and the **Assigned Worker**.

- A. True
- B. False

Question 4: Which widget provides you with a list of items that you need to approve on your **Homepage**?

- A. Today's Tasks
- B. Items to Approve
- C. The Pending List View
- D. My Tasks

Question 5: Which tab from the **Home Menu** gives you access to viewing provider information and the **Provider List View**?

- A. Cases
- B. Person
- C. Documents
- D. Provider

Module 2: Person Management

This module covers the end-to-end process of managing Person Records in C-FIRST!. It begins with searching for existing Person Records before creating new ones, a critical step that prevents duplicate records in the system. Users will practice searching by name and date of birth, handling scenarios where no results are returned, and searching with limited information. When a search confirms no existing record, the module walks through creating a new Person Record, generating a Person ID (PID), and establishing the appropriate Person Type.

The module then covers maintaining accurate person demographics throughout an Investigation, including editing records, adding aliases, updating household member information, and uploading photos. Address and contact management is addressed in detail, covering how to add addresses using the Smarty lookup, manage addresses for relatives, review address history, and add phone numbers. The module concludes with linking persons to Investigation Cases as Case Persons, assigning roles such as Alleged Child Victim or Alleged Perpetrator, creating Relationship Records between family members, and designating the Primary Caregiver for assessments.

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

- Navigate to the Person Search Screen
- Search for existing Person Records and interpret search results to prevent duplicates

INTAKE PERSON	CASE PERSON
Intake Person A new intake person ID is assigned per intake. The same person can appear across multiple intakes with different IDs. Sally: Intake A → ID 32456 Intake B → ID 856325 → PID 875235 • 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 A new case person ID is assigned per case. The same person receives a different case person ID in each case. Jane Doe: Case 2020 → ID 56789 Case 2026 → ID 345678 → PID 12345 • 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. Sue Smith: DCS Foster Home → ID 56789 Youth Villages → ID 23785 → PID 123456 • 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? - Tribal Name - Other Tribal 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

Lesson 1: Person Management

This module covers the end-to-end process of managing Person Records in C-FIRST!. It begins with searching for existing Person Records before creating new ones, a critical step that prevents duplicate records in the system. Users will practice searching by name and date of birth, handling scenarios where no results are returned, and searching with limited information. When a search confirms no existing record, the module walks through creating a new Person Record, generating a Person ID (PID), and establishing the appropriate Person Type.

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) or **Staff** (DCS employee).

The **Case Person** serves as a link of an individual's Person record to a specific Case. Case Person is listed on the Case's related list. 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.

Learning Objectives

- Search for existing Person Records and interpret search results to prevent duplicates
- Interpret search results and identify potential matches
- Create new Person Records, generate a Person ID (PID), and establish a Person Type
- Edit Person Demographics

Task 1: Search for Existing Person

Complete the following steps to accomplish this task.

1. From the **Homepage**, click the **Persons** tab. The **Recently Viewed** list view displays.
2. Click the **New** button located in the upper right. The **Search for a Person** screen opens.
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! executes the search and displays matching results in the **Search Results** section.
6. Review the search results list for potential matches. Each result displays the person's name, date of birth, and SSN (last four digits).
Note: While on the Search Results screen, you can use the Clear button to reset your search results.
7. From the search results, click the **dropdown arrow** at the end of the row and select *View*. The **Person Detail** screen displays.
Note: To associate the person to a case, select *Associate* from the dropdown instead of *View*.



System Tip!

Only a Person record with the PID generated can be associated to the Case.

Task 2: Perform a Search That Returns No Results

During your Investigation of the Stillman family, you learned that Donald Ranch recently moved in. Donald has no prior DCS history in Tennessee. You will search for James to confirm no existing record exists before creating a new one.

1. Click the **Clear** button to reset all search fields or return back to the **Search for a Person** screen. C-FIRST! clears the previous search criteria.

2. Click the **Last Name** field and enter *last name####*.
3. Click the **First Name** field and enter *first name*.
4. Click the **Date of Birth** field and enter *date of birth*.
5. Click the **Search** button. C-FIRST! displays the message, "Exhaustive search has found no evidence of any matches in the database."

Note: When no matches are found, you must create a new Person Record to add this individual to the Case.

Task 3: Create a Person Type Record

When the family arrives at the County office and requests RCP services, the Kinship Worker creates the Jason, the child and related family members in the system.

1. Click the **Person** tab from the **Home** dropdown. The **Recently Viewed Persons list view** displays the list of Persons in C-FIRST! including details like Name, PID, Gender Identity/Expression, Gender at Birth, Age, Custody Status and Ethnicity.
2. Click **New** to add the child as a Person. The **Search for a Person** pop-up displays.
3. Click the **First Name** and **Last Name** fields and enter the name of child/youth to search for a duplicate record.
4. Click **Search**. The search generates a list of approximate matches. If a matching record displays, click the **Person Name** hyperlink to open the Person Record.
5. Click **New Person**. The **New Person** pop-up displays. Enter the mandatory details into the sections to create a new Person.
6. Click the **Gender at Birth** dropdown and select the appropriate option.
7. Click the **Date of Birth Unknown** dropdown and select the appropriate option.
8. Enter the **Date of Birth**.
9. Click the **Ethnicity** dropdown and select **Hispanic or Latino**.
The options in the dropdown are:
 - Hispanic or Latino
 - Not Hispanic or Latino
 - Unable to Determine

10. Click the **Race** field, then click the right arrow icon to select an option from the **Available** section. The options in the Available section are:
 - Abandoned
 - American Indian or Alaska Native
 - Asian
 - Black or African American
 - Declined
 - Native Hawaiian or Other Pacific Islander
 - White
 - Unknown
11. Click **Save**. The Person Record is created.

**System Tip!**

- Users can select the **Person** radio option to capture client information.
- A PID of a Person must be generated before creating a Person Type Record.
- Users can select the **Staff** radio option to capture staff information.
- Only a System Administrator, FCCR, and Volunteer Coordinator can create a Staff Record.
- The **Is Person Validated** field displays if the person has a PID and is validated in C-FIRST!.

Task 4: Generate a Person ID (PID)

After saving the Person Record for James Wilson, you must generate a Person ID (PID). The PID is a unique system identifier that links all records associated with this individual across C-FIRST!.

1. On the **Person Details** screen, locate the **Generate PID** button in the action bar.
2. Click the **Generate PID** button. C-FIRST! displays a confirmation dialog. A message displays saying that a PID has been successfully generated.

**System Tip!**

Verified SSNs support accurate identity matching across the system and with external interfaces such as the Department of

Safety and Homeland Security. If you are unable to verify the SSN during the first contact, leave the **Verified** field as *No* and document the reason in the Case notes. When a verified SSN is entered, the system can cross-reference the number against external databases to confirm the person's identity. When the **SSN Verified** field is set to *Yes*, the verification happens automatically, and the record is saved. If the verification returns a mismatch, C-FIRST! displays a warning message. If you receive a verification mismatch, contact your Kinship Coordinator.

Task 5: Add Person Type

After saving the person, you need to add a person type.

1. On the **Person Details** screen, click the Person Type Related List Quick Link.
2. On the **Person Type Related** screen, click New.
3. Select the Person radio button.
4. Click Next.
5. Click the **Status** dropdown, select *Active*.
6. Click the **Human Trafficking Survivor?** dropdown, make the appropriate selection.
7. Click the **Living Arrangement** dropdown, make the appropriate selection.
8. Click the **Tribal Affiliation** dropdown, make the appropriate selection.
9. Click the **Child Ever Fathered/Bore Children?** dropdown and make the appropriate selection.
10. Click the **Has the Child Ever Been Adopted?** dropdown and make the appropriate selection.
11. Select Save.

Lesson 2: Searching for Provider Records

Learning Objectives

- Navigate to the Provider Search functionality in C-FIRST!
- Search for Providers

Task 1: Access Provider Search

1. From the Home tab select Provider Search from the drop down menu. C-FIRST! opens the **Search for a Provider** screen. Note: The Search Provider screen allows users to search by Provider Details, Address Details, and Provider Type.
2. Enter the Provider Information you want to search by then click Search. C-FIRST! will display the search results at the bottom of the screen.

Module 3: Case Process Reviews

The Case Process Review (CPR) is a key quality assurance tool in C-FIRST! that enables Case Management Supervisors to review child welfare cases for compliance, safety, and case management quality.

After completing this module, you will be able to:

- Explain how Case Process Review Samples are generated
- Complete and Submit a Case Process Review
- Review a Case Process review

Lesson 1: Generate Case Process Review Sample

This lesson covers how to generate a random sample of cases for review and assign those reviews to the appropriate staff.

Learning Objectives

- Navigate to the Random Sample Generator in C-FIRST! and create a new sample record configured for Case Process Reviews
- Configure sample criteria including region, county, case type, sample size or percentage, and review period
- Generate a case review sample file and verify it appears in the Random Sample Files list
- Assign Case Process Reviews to the appropriate staff members for completion

Task 1: Generate Sample

The **QA/QI Director** generates a random sample of cases using the **Random Sample Generator** in C-FIRST!. Here, you will learn how to configure the sample using the criteria provided and generate the sample file.

Note: For training purposes, we are going to use the *CPS Investigation* as an example for generating a random sample.

1. Log in as the **QA/QI Director** and from the **Homepage**, click the **Home** drop-down and select the **Random Sample Generator** option. The **Random Sample Generator** List View displays.
2. Click **New** to generate a new sample. The **New Random Sample Generator** pop-up displays.
3. Navigate to the **Information** section of the page.
4. In **Type of Case/Service**, select the type from the **Available** multi-select box and click the **right arrow** icon. The other options in **Available** multi-select box are:
 - Adoption Subsidy
 - Bright Futures (EFC)
 - CPS Assessment
 - CPS Investigation
 - FCIP
 - FSS
 - Guardianship
 - Guardianship Subsidy
 - ICPC
 - Relative Caregiver (non custody)
 - SIU
5. In **Region**, select the region from **Available** multi-select box and click the **right arrow** icon.
6. In **County**, select the county from **Available** multi-select box and click the **right arrow** icon.

Note: The selected county and region must be correctly mapped. If they do not match, C-FIRST! will display the error.
7. Click the **Sample Percentage** drop-down and select the sample.

Note: Case Monitors must enter either a value in the **Sample Size** field OR select a value from the **Sample Percentage** drop-down. If both Sample Size and Sample Percentage are selected, C-FIRST! will display the error.
8. Click the **Period Start Date** field and enter the required date.
9. Click the **Period End Date** field and enter today's date.

Note: Case Monitors can additionally click the following fields and enter the required data:

 - Custody Status
 - Case Assignment

- Case Assignment Location
 - Percentage of Sample (Open Cases)
 - Case Status
 - Record Status
 - Duration of Case – Custodial
 - Duration of Case – Non-Custodial
 - Duration of Child/ACV
 - Placement Type
10. Click the **Case Status** field and select the status.
 11. Click the **Record Status** field and select the status.
 12. Click the **Sample Name** field and enter *CPR Sample*.
 13. Click **Save**. The **Random Sample Generator** record is created and displays.
 14. Click **Generate Sample**. The **Generate Sample** pop-up displays, confirming that the sample file will be available shortly.
Note: C-FIRST! displays an error in case the **Generate Sample** button is clicked and the added filter selection for sample generation is not sufficient.
 15. Verify that a sample file is generated and automatically added to the **Files** hyperlink in the **Related List Quick Links** section.
Note: Case Monitors must verify the sample file link appears in the **Sample File Link** field on the record details screen.

Task 2: Download File & Assign Case Reviews

Now that the sample has been generated, you can assign individual **Case Process Reviews** to the appropriate case worker/monitor staff for completion. **Note:** *Please continue to follow your current business process on assigning case process reviews.*

1. From the **Random Sample Generator Detail** screen, click the **Files** hyperlink from the **Related List Quick Links** section. The **Files** screen displays.
2. Click the **CPR Sample** link under the **Title** column. The file is downloaded.
Note: The file is downloaded in the .csv format.
3. Open the downloaded file and locate the required **Case ID** record.

4. Assign the **Case Process Reviews** to your staff.

Lesson 2: Complete Case Process Review

Case Process Reviews allow QA Staff to document their review findings across multiple questionnaire areas. This lesson walks through accessing your assignment, navigating to the case record, opening the CPR tool, completing questionnaires, and submitting the review for approval.

Learning Objectives

- Navigate to the Case Process Reviews List View
- Access Case Details from Case Process Review record
- Access and open the Case Process Review tool from the Case record
- Complete all required Case Process Review questionnaires, including the Investigation, Custodial, Non-Custody, or Bright Futures questionnaire tabs, as applicable
- Submit the completed Case Process Review to the Primary Reviewer for approval
- Review and approve Case Process Reviews

Task 1: Search Case Process Review Assignment

You have received your Case Process Review assignment from the Director.

1. Log in as the assigned **PME Monitor/Reviewer** and navigate to the **Homepage**.
2. Access the **Global Search Bar**.
3. Enter the **Case ID** and select the record. The **Case Details** screen displays.

Task 2: Access Case Details and Other Information

The Case Details screen is your “landing page” for your Case Process Reviews. This page provides access to all of the information that you need to complete your review of the case.

1. From the **Case Details** screen, access the **Related List Quick Links**.
2. The **Related List Quick Links** provides you with multiple areas where you can begin your review. This includes: Case Conferences, Plans, Legal information, placement and provider

information, and all other links that give you access to case information.

Task 3: Access the Case Process Review Tool

From the Case record, create a Case Process Review record to begin documenting your review findings.

1. From the **Case** screen, click the **Case Process Reviews** hyperlink in the **Related List Quick Links** section. The **Case Process Reviews** screen displays.
2. Click **New**. The **New Case Process Review** pop-up displays.
3. Select the **Bright Futures** radio button and click **Next**. The other options are:
 - Custody
 - Investigation
 - Non-Custody
4. Access the **Information** section of the page.
5. In the **New Case Process Review: Bright Futures** pop-up, click the **Reviewer** field in the **Information** section and enter *Case Reviewer*.
6. Scroll down to the **Case Details** section.
7. Click the **Case Manager** field and enter *Case Manager*.
8. Click the **Case Supervisor** field and enter *Case Supervisor*.
9. Click the **Education Level** drop-down and select *High School*. The options in the drop-down are:
 - College/Trade School
 - GED HiSet
 - High School
 - Not Currently Enrolled in School
10. Click the **Placement Type** drop-down and select *Family Based (Foster Care)*. The options in the drop-down are:
 - Detention
 - Family Based (Foster Care)
 - Hospitalization
 - Residential
 - Runaway
11. Click the **Person ID** field and enter XXXX.
12. Click the **Was the Case Transferred** drop-down and select *No*.

13. Click **Save** button. The **Case Process Review** record is created and displays.

**Process Tip!**

To complete your **Case Process Review** and update your findings in the **Questionnaire**, keep one tab open with your Case Details, and one tab open to your **Questionnaire**. This will allow you to view case information as you complete your **Questionnaire** for the case review.

Task 4: Complete Case Process Review Questionnaires

As a Case Reviewer, you must complete all required questionnaire fields within the Case Process Review. Questionnaire content varies based on the record type (Investigation, Custodial, Non-Custody, or Bright Futures). Each questionnaire captures your findings across key areas of case compliance and practice quality.

1. From the **Case Process Review** Details tab, click the **Questionnaire** tab. The questions under the **Questionnaire** tab display.
2. Review each question on the following sections and click the response drop-down to select the appropriate answer (Yes, No, or N/A as applicable). The sections include:
 - Person Page
 - Documents
 - Electronic Case File
 - Treatment Case
 - Reviewer Observation

Here are some best practices while completing the questions in the questionnaire:

- For questions with conditional follow-up checkboxes (e.g., 'If no, please identify the issue(s)'), check all applicable items that apply to your findings.
- For questions involving transferred cases, SIU cases, drug-exposed cases, or closed cases, only answer the fields that display based on the case's criteria.

- Enter your findings in the **Strengths** field in the **Reviewer Observation** section to document positive case practice observed during the review.
- Enter your findings in the **Action Steps** field in the **Reviewer Observation** section to document areas where corrective action or follow-up is needed.
- Click **Save** periodically to save your progress.
- Click **Save as Draft** if the questionnaire is incomplete and not ready for review. Clicking **Save as Draft** navigates the user back to the **Case Process Review** Details screen.

Note: When you navigate back to the **Questionnaire** tab after saving the questionnaire as a draft, C-FIRST! asks if you want to continue from where you left off or start from the beginning.

Task 5: Update the Review Status

Once all questionnaire fields are complete and saved, C-FIRST! automatically redirects you to the **Case Process Review** Details screen. Here, you must update the review status.

1. From the **Case Process Review** Details screen, click the **Pencil** icon beside the **Status** field. The fields become editable.
2. Click the **Status** drop-down and select *Completed*.
3. Click **Save**.

Note: Upon successful save, the record becomes read-only and C-FIRST! sends a notification to the case manager's assigned supervisor with a link to the case and the review record. In case the Case is active, the Supervisor may review and address the action steps. At this point in time, the record is locked, no longer editable, and becomes read-only.

Lesson 3: Receive Case Process Review Completed Record

Case Process Reviews, unlike Provider Monitoring & Evaluations, do not include a formal approval process. Once a Case Process Review is complete, the system notifies the reviewed case's Supervisor.

Learning Objectives

- Identify a notification for a completed CPR record
- Access case information

Task 1: Receive CPR Completed Notification & Access Case Details

1. Log in as the **Supervisor** and access the **Homepage**.
2. Navigate to the Notification Bell.
3. The following notification displays: *"A case process review has been completed on one of your cases. Please review and address the action steps within 30 days from completion"*.
4. Select the **Case ID** hyperlink. The **Case Details** screen displays.
5. Review case record.

Knowledge Check!

Question 1: When creating a sample, what must the Case Monitor enter?

- A. Both Sample Size and Sample Percentage
- B. Either Sample Size or Sample Percentage
- C. Sample Percentage only
- D. Sample Size only

Question 2: Which tab contains the review questions that the reviewer must complete?

- A. Details tab
- B. Attachments tab
- C. Questionnaire tab
- D. Activity tab

Question 3: Where should corrective action or follow-up needs be documented?

- A. Action Steps field
- B. Reviewer field
- C. Case Assignment field
- D. Strengths field

Question 4: *True or False:* Staff must submit the Case Process Review for approval and supervisors must access the review and click the **Submit for Approval** button.

- A. True
- B. False

Module 4: Provider Monitoring Reviews

Provider records in C-FIRST! allow Quality Compliance staff to monitor and evaluate the performance of out-of-home placement providers. This module covers the end-to-end Provider Monitoring Review process, from creating a review record to completing Provider Monitor Review questionnaires and submitting and approving the final review.

After completing this module, you will be able to:

- Assign Provider Monitor Reviews to the appropriate case worker/monitor staff
- Access a Provider Monitor Review assignment
- Complete all required Provider Review Questionnaires, documenting findings across all visible fields
- Submit a completed Provider Monitor Review for approval
- Approve a Provider Monitor Review as a Director

Lesson 1: Create a New Review

This lesson walks through creating a new review, selecting a review tool, and assigning a Case Worker/Monitor to complete a review.

Learning Objectives

- Create a new Provider Monitoring Review record
- Assign the record to a Case Worker/Monitor

Task 1: Create New Provider Monitoring Review Record

As a Reviewer, your first step is to create a new Provider Monitoring Review record in C-FIRST!.

1. Login as **PME Monitor/Reviewer** and from the **Homepage**, click the **Home** drop-down and select **Provider**. The **Provider** List View displays.
2. Click the required **Account Name**. The **Provider** record displays.
3. Click the **Provider Monitoring** hyperlink from the **Related List Quick Links** section. The **Provider Monitoring** screen displays.
4. Click **New**. The **New Provider Monitoring** pop-up displays.
5. Click the **PME Annual Review (PBC)** radio button and click **Next**. The **New Provider Monitoring: PME Annual Review (PBC)** pop-up displays.

6. Click the **Monitor Name** field and enter the name,
7. Click the **Primary Reviewer** field and enter the case reviewer.
8. Click the **Status** field and enter the status.
9. Click **Save**. The record is created and displays.

Note: A task is generated for review.

Lesson 2: Complete Provider Monitor Reviews

This lesson walks through accessing your assignment, navigating to the provider record, completing review questionnaires, and submitting the review for approval.

Learning Objectives

- Navigate to the Provider List View
- Access and open the Provider Monitor Review Tool from the Provider record
- Complete all required Provider Review Questionnaires with accurate findings
- Submit the completed Provider Monitor Review to the Primary Reviewer for approval

Let's get started!

Task 1: Access Your Provider Monitor Review Assignment

You have received a notification that a Provider Monitor Review has been assigned to you. Access your assignment in C-FIRST!.

1. Log in as the assigned **PME Monitor/Reviewer** and click the **notifications** icon on the **Homepage**. A list of notifications display.
2. Click the required notification. The **Task Details** screen displays.
3. Scroll down to the **Navigation Links** section.
4. Click the **Related To** hyperlink. The **Provider Monitoring** screen displays.
5. Review the assignment details, including the provider name, record type, assigned reviewer, and status, which defaults to *Pending*.

Task 2: Navigate to Provider Record

From your Provider Monitor Review assignment, navigate to the associated Provider record to access review tools and documentation.

1. From the **Provider Monitoring** Detail screen, scroll down to the **Navigation Links** section and click the **Provider Name** hyperlink. The Provider record displays.
2. Review the provider's current information, including status, placement type, and any recently flagged incidents or complaints.

Task 3: Access the Provider Monitor Review Tool

From the Provider record, open the Provider Monitoring Review Tool to begin completing your review questionnaires.

1. From the Provider record screen, click the **Provider Monitoring** hyperlink from the **Related List Quick Links** section. The **Provider Monitoring** screen displays.
2. Click the appropriate **Provider Monitoring ID** to navigate to the review tool.
3. Verify that the review record matches your assigned provider and review period before proceeding.

Task 4: Complete Provider Review Questionnaires

Complete all required questionnaire sections within the Provider Monitor Review Tool. Questionnaires capture your review findings across multiple categories of provider compliance and performance.

1. From the **Provider Monitoring** Details screen, click the **Agency Questionnaire** tab. The questionnaire displays.
Here are a few best practices to proceed with the questions in the questionnaire.
 - Review each question and select or enter the appropriate response based on your findings.
 - Enter supporting notes or observations in the **Comments** field where applicable.
 - Click **Save** after completing each questionnaire section. C-FIRST! saves your responses.

- Click **Save as Draft** if the questionnaire is incomplete and not ready for review. Clicking **Save as Draft** navigates the user back to the **Case Process Review Details** screen.
Note: When you navigate back to the **Questionnaire** tab after saving the questionnaire as a draft, C-FIRST! asks if you want to continue from where you have left or start from the beginning.

Task 5: Submit Provider Monitor Review for Approval

Once all questionnaires are complete, follow the steps to submit your Provider Monitor Review to the Primary Reviewer for approval.

1. From the **Provider Monitoring Details** screen, click the **Pencil** icon beside the **Status** field. The fields become editable.
2. Click the **Status** drop-down and select *Ready For Review*.
3. Click **Save**. The record is saved and the **Submit for Approval** button displays.
4. Click **Submit for Approval**. The **Submit for Approval** pop-up displays.
5. Click the **Comments** field and enter the required comments.
6. Click **Submit**. The record is routed to the **PME Primary Reviewer** for their approval.

Note:

- If any required sections are incomplete, C-FIRST! displays a validation error. Any errors must be resolved before attempting resubmission.
- In case the Primary Reviewer is not available to review, a second or third Case Worker/Monitor can update the status to *Completed* after reviewing the questionnaire.

Lesson 3: Complete Provider Monitoring & Evaluation

The **Primary Reviewer** is responsible for evaluating the completed provider monitor reviews submitted by staff. This lesson covers how to access Provider Monitor Review list views and review the completed questionnaires prior to approval.

Learning Objectives

- Access the appropriate list views to locate Provider Monitor Reviews awaiting evaluation.
- Open and review completed questionnaires submitted by case workers/monitors.

Task 1: Access the Approval Notification

1. Log in as the **PME Primary Reviewer** and navigate to the **Homepage**. The **Homepage** displays.
2. Click the **Notification** icon. A list of notifications display.
3. Click the required notification requesting approval for provider monitoring. The **Approval Requests** screen displays.
4. Click the **Provider Monitoring ID** hyperlink to validate the review. The Provider Monitoring record displays.

Task 2: Review Questionnaires

From the Provider Monitoring Review record, review the completed questionnaires to assess the accuracy and completeness of the case worker's findings.

1. From the **Provider Monitoring** Detail screen, navigate to the **Agency Questionnaires** tab. The sections in the **Questionnaire** tab display.
2. Review each completed questionnaire and the responses entered by the assigned Case Worker/Monitor.
3. Verify that all required fields are completed and that responses are consistent with provider documentation.
4. Note any discrepancies, incomplete entries, or items requiring follow-up for discussion with the assigned reviewer.
5. Return to the **Provider Monitoring** record when your review of all questionnaires is complete.

Task 3: Approve Provider Monitor Review

Once satisfied with the review, formally approve the **Provider Monitoring** record in C-FIRST!.

1. Navigate back to the **Approval Request** screen. The **Approval Request** screen displays.
2. Click **Approve**. The **Approve Provider Monitoring** pop-up displays.

3. Click **Approve**. The **Status** field is updated to *Completed* and the Director receives a notification that the Review is approved.

Note: In case changes are required to the review, click **Reject** and provide comments to the Case Worker/Monitor on the **Reject Provider Monitoring** pop-up, The Case Worker/Monitor receives a notification that the review needs updates.

Knowledge Check!

Question 1: After opening the Provider record, which hyperlink is selected to create a review?

- A. Agency Questionnaire
- B. Related To
- C. Approval Requests
- D. Provider Monitoring

Question 2: What status must be selected before the Submit for Approval button appears?

- A. Pending
- B. Completed
- C. Approved
- D. Ready for Review

Question 3: Which statement is TRUE about Provider Monitoring review?

- A. Users should click Save as Draft only when the questionnaire is fully complete
- B. After selecting Ready For Review and saving, the Submit for Approval button displays
- C. Rejecting the Provider Monitoring review updates the status to Completed
- D. The default status of a new Provider Monitor Review assignment is In Progress

Module 5: Reports & Dashboards

After completing this module, you will be able to:

- Identify reports relevant to your program area
- Understand the Case Process Review, Provider Monitoring & Evaluation, and the Performance Standard Reports
- Access and filter reports
- Download reports

Lesson 1: Case Process Reviews and Provider Monitoring & Evaluation Reports in C-FIRST!

Certain staff, based on security access, have access to reports that provide information related to case process reviews and provider monitoring & evaluation. All reports are housed within Tableau. Staff (with approved security designation) have access to these reports. These reports are accessible to you within C-FIRST! via a hyperlink. Staff use login credentials to access the reports.

Learning Objectives

- Identify the reports that are available to you

Let's take a moment to discuss a couple of example reports that the system provides.

Task 1: Case Process Review (CPR) Report Overview

This report provides results of case process reviews that include all program areas within DCS. This report helps review the results of the reviews and track the completion of the reviews. This report includes the case process review ID, the review completion date, the case type, the status of the review, and other applicable information.

This report allows staff to filter information by date range, program area, and review status.

Task 2: Provider Monitoring & Evaluation (PME) Report Overview

This report provides a comprehensive and customizable view of performance metrics across various categories when it comes to

providers such as personnel, safety, well-being, CANS, and permanence. This report includes key performance indicators, positive and negative response counts, and overall totals to support monitoring and evaluation of service providers. This report includes the parent provider, the provider ID, the provider name, the fiscal year associated with the PME, and other applicable information.

This report allows staff to filter information by fiscal year and parent provider.

Task 3: Performance Standard Report Overview

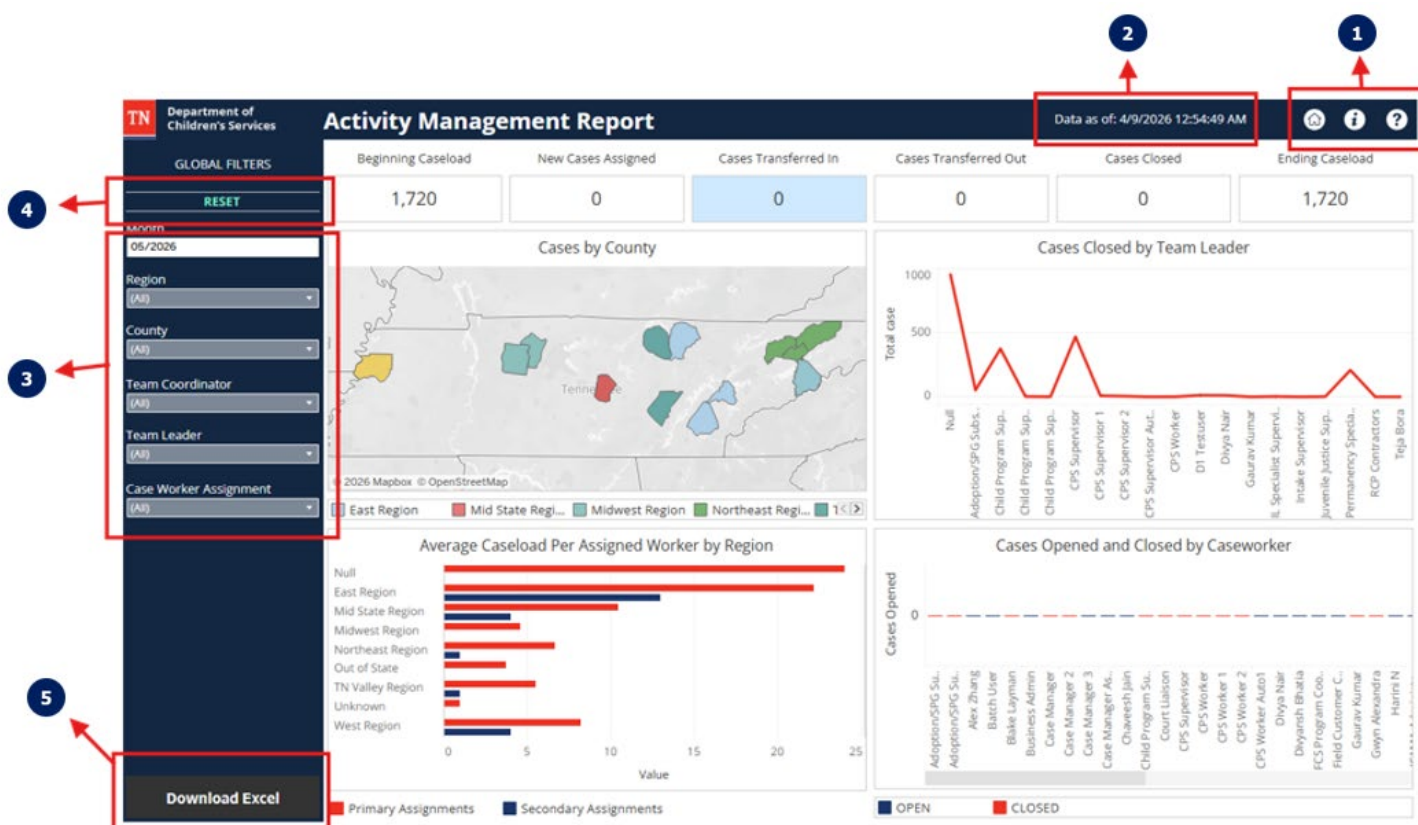
This report provides a comprehensive view of performance metrics for service providers, including program monitoring and evaluation standards such as safety, therapy, and teaming. This report supports the evaluation of provider performance against our established standards and the determination of financial incentives based on performance. This report includes the parent provider, the provider ID, the provider name, the fiscal year associated with the PME rating, and other applicable information.

This report allows staff to filter information by fiscal year and parent provider.

Next, let's discuss how to access these reports within Tableau.

Lesson 2: 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:

- Navigation links to access the Home Page, Info Page, and Help.
- Indicates the time the report was last refreshed with the Data Warehouse.
- Filters to slice and dice the data. These filters vary with each report.
- The Reset button helps reset the filters to their default values. The Reset button will not change any date filters on the report.
- 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.

To log in to Tableau,

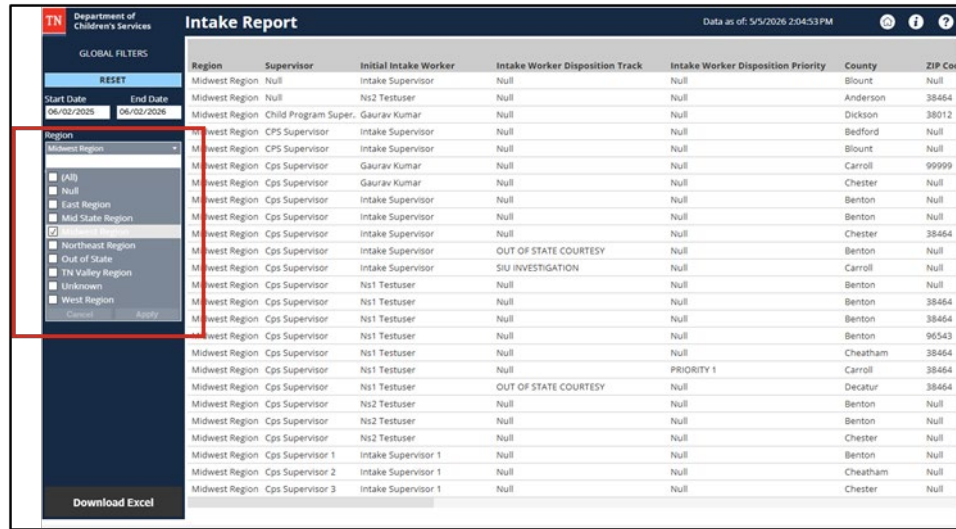
1. Enter your Username and Password which would be the same as your state log in credentials.
2. The **Home** screen of the main C-FIRST! Reports Home Page lists all reports with the respective categories and links to access them.
 1. The **Home** Screen icon navigates to the Home page.
 2. The **Info** icon navigates you to the Information page which contains details about each report.
 3. The **Help** icon opens up a ribbon as well as a Mail to link to contact Tableau admin for any issues.
 4. The **Filter** option filters out reports by the respective categories.
 5. The **Link** beside each report navigates you to that specific report.

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.



Intake Report Data as of: 5/5/2026 2:04:53 PM

GLOBAL FILTERS

RESET

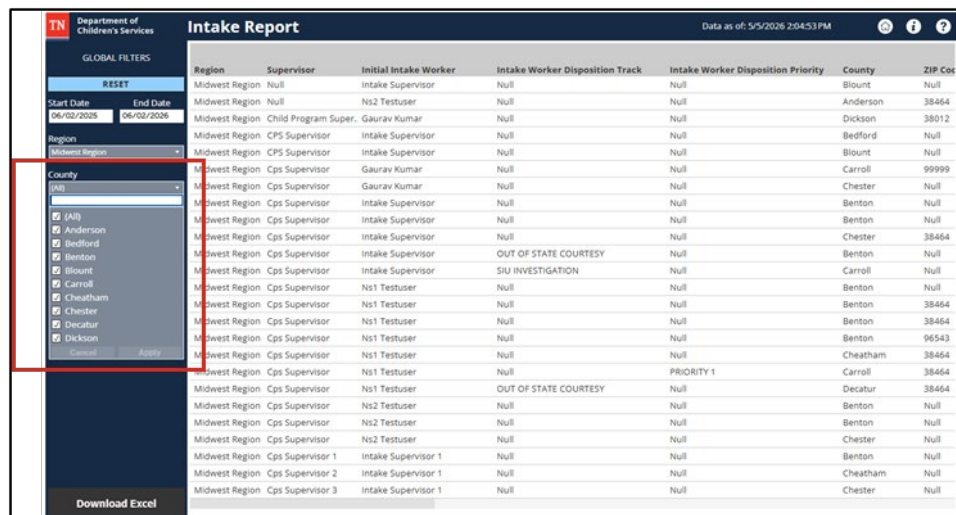
Start Date: 06/02/2025 End Date: 06/02/2026

Region: Midwest Region

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	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	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	Null	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

Download Excel

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: 06/02/2025 End Date: 06/02/2026

Region: Midwest Region

County: Anderson

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	Intake Supervisor	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	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	Null	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

Download Excel

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.
3. Click **Download**.

Download Crosstab [X]

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.

Knowledge Check!

Question 1: The Case Process Review report provides which of the following information?

- A. Completion Date
- B. Case Type
- C. Status
- D. All of the above

Question 2: The Provider Monitoring & Evaluation report provides the following information?

- A. Address
- B. Demographic Information
- C. Provider Name
- D. Case Referral Information

Question 3: *True or False:* Reports are housed in Tableau.

- A. True
- B. False

Glossary

This glossary defines key terms and acronyms used throughout this training module:

Term	Definition
C-FIRST!	This refers to Tennessee's new Child Welfare platform built on Salesforce. C-FIRST! stands for Child and Family Information Records System Tracking.
Case Process Review (CPR)	A structured quality review of a child welfare case to check whether required processes, documentation, and practice standards were followed.
CCWIS	This refers to the project, Comprehensive Child Welfare Information System, which is working towards delivering a modernized child welfare system.
Field	A part of an object that holds a specific piece of information, such as text or a number.
List View	A list display of items (for example accounts or contacts) based on a specific criterion.
Navigation Links	This is a section on all related lists and other main screens (Provider, Case, Intake). The links allow you to navigate to associated records such as the parent record.
Provider Monitoring & Evaluation (PME)	A structured review of a service provider's performance, compliance, and service quality in child welfare.
Related List	A section of a record or other detail page that lists items related to that record.
Related List Quick Links	This is a section on top of any record that displays a list of links that leads to List Views of records related to the original record.

Term	Definition
Widget	A small part of an app, like a button, search box that you can see or get information.