



C-FIRST! Training

Eligibility Course Learner Guide

Tennessee Department of Children's Services



Eligibility Course Learner Agenda

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Introduction

Welcome to the State of Tennessee Department of Children's Services (DCS) C-FIRST! **Eligibility 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 provides practical end-to-end learning of fundamental eligibility processes in C-FIRST!, including how eligibility is determined, documented, approved, and maintained to support timely, compliant foster care and SPG services. Other related processes include reviewing eligibility, reimbursability outcomes, court orders and petitions, processing Bright Futures & Adoption cases, and understanding how Prevention Services eligibility records are created.

Let's Dive In

Throughout the course, you will be guided through topics related to Eligibility processes. You will be tasked with:

1. Accessing court and placement information
2. Understanding how placement and provider information inform eligibility calculations
3. Updating eligibility information on a person record
4. Understanding how person and income information carries over to eligibility records
5. Calculating eligibility for a person and reviewing eligibility outcomes
6. Understanding batch processing that auto-generates reimbursability records
7. Reviewing reimbursability records and understanding how reimbursability records are processed by the Finance Department

Your Role

As the **Max Specialist**, or staff who support eligibility processes such as the **Case Manager, Permanency Specialist, Independent Living Specialist, RCP Worker, and Bright Future Contractors**, you are responsible for completing your tasks in a timely manner and processing accurate case and eligibility information against person records within C-FIRST!.

In this course, we introduce you to a few cases which provide you with an understanding of how eligibility information is entered for Foster Care, Bright Future, Adoption, SPG, and Prevention Services cases.

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.

Course Objectives

By the end of this training, you will have hands-on experience navigating C-FIRST!, applying policy guidance, and processing eligibility functions in the system. You will gain practical skills in processing eligibility for foster care services, learn how to update case information to determine eligibility funding, review reimbursements, FFPSA Prevention Services, Bright Futures eligibility information, process Adoption and SPG services, and learn Supervisor processes related to eligibility in C-FIRST!

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!.

Icon	Description
	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.

Eligibility Course Case Scenarios

Before we dive into more details about processing eligibility information in C-FIRST!, let's first take a moment to discuss the families you meet today. This lesson provides you with a brief overview of all case scenarios that you meet during the duration of this course to introduce you to eligibility concepts.

Learning Objectives

- Understand the Rainfall family scenario for processing Family First Prevention Services eligibility
- Understand the Dean family scenario for processing Foster Care and Bright Futures eligibility
- Understand the Garcia Family for processing Adoption eligibility
- Understand the Ramirez family scenario for processing Relative Caregiver eligibility

Scenario 1: Meet the Rainfall Family

Overview

Toby Rainfall is a 9-year-old enrolled in the fourth grade. The initial report came from Toby's school after repeated concerns about inconsistent supervision and home instability. During the initial safety and risk assessment, the **Case Manager** determined there was a risk of Toby entering foster care if conditions at home do not improve. As a result, the team completed the FAST (Family Advocacy and Support Tool) assessments to inform prevention eligibility and service planning. The **Case Manager** conducts a Child and Family Team Meeting (CFTM) with identified members. Following the meeting, the Case Manager creates the Family Permanency Plan and submits the Family First Prevention Services Act (FFPSA) referral for service. The

FFPSA Program Coordinator reviews and approves the referral, and the family begins to receive services from DCS. DCS continues the monitoring process by documenting service delivery and progress notes to reduce risk and prevent foster care entry. We will follow Toby's case through **Module 2: Family First Prevention Services**.

Case Information

- **Case Type:** Treatment Case
- **Program Type:** Family Crisis Intervention Program (FCIP)
- **Eligibility Type:** FFPSA Eligibility
- **Case Members:** Toby Rainfall (Child, 9M), Riley Rainfall (Custodial Parent / Primary Caregiver, 31F), Morgan Rainfall (Non-Custodial Parent (NCP), limited involvement, 33M), Ava Rainfall (Sibling, 5F), Jordan Pike (Maternal Aunt/Safety Support, 38F)
- **Child Citizenship:** U.S. Citizen
- **Referral Source:** School referral citing chronic attendance issues, inconsistent pick-up routines, and concerns about inadequate supervision after school.

Scenario 2: Meet the Dean Family

Overview

Jordan Dean is a 17-year-old who is in **Foster Care**. Jordan's primary caretaker at the time of the incident is Tulip Dean, his mother. His father, Derek Dean, is the non-custodial parent (NCP) with limited contact. An Incident Report comes from Jordan's school (this information is updated on Jordan's Investigation Case). Soon after, DCS takes custody of Jordan. The **Eligibility Worker** receives the task to process Jordan's case for Foster Care eligibility. Jordan remains in Foster Care and enters **Bright Futures when he turns 18 where he remains with his foster parents**. We will follow Jordan's case throughout **Module 3: Foster Care Eligibility** and **Module 4: Bright Futures Eligibility**.

Case Information

- **Jordan Dean DOB:** 1/1/2009
- **Case Members:** Jordan Dean (Child, 17M), Tulip Dean (Custodial Parent, 36F), Derek Dean (Non-Custodial Parent/Father)
- **Child Citizenship:** U.S. Citizen
- **Court Order:** Reasonable Efforts (Bright Futures)
- **Providers:** John and Julie Smith (Foster Parents)
- **Case Type:**
 - Module 3: Treatment Case (IV-E eligible)
 - Module 4: Bright Futures (IV-E eligible)
- **Program Type:**
 - Module 3: Foster Care (Out-of-Home Care/Placement)
 - Module 4: Bright Futures (Placement)
- **VPA Information:**
 - Module 3: No Voluntary Placement Agreement
 - Module 4: No Voluntary Placement Agreement
- **Eligibility Type:**
 - Module 3: Foster Care Eligibility
 - Module 4: Bright Futures Eligibility
- **Resources & Income Information**
 - Module 3:
 - Jordan does not have any resources or income
 - Jordan's mother, Tulip, has monthly wages that total \$500.00 a month
 - Module 4:
 - Jordan has \$650.00 dollars in a Checking Account
 - Jordan owns a car that is worth \$3,500.00

Scenario 3: Meet the Garcia Family

Overview

Judy Garcia is a 7-year-old who entered foster care due to ongoing safety concerns in her biological home. Judy's school reported an incident, and a Treatment Case was opened in C-FIRST! During the lifecycle of Judy's case, DCS determines reunification is not a safe and viable option for Judy, and the case moved toward termination of parental rights (TPR) and permanency through adoption. We will

follow Judy's case throughout **Module 5: Adoption Services** which includes creating an adoption eligibility record, updating and submitting the eligibility record, creating case adoption agreements and petitions, and finalizing case agreements.

Case Information

- **Case Type:** Permanency Case
- **Eligibility Type:** Adoption
- **Case Members:** Judy Garcia(Child, 7F)
- **Placement / Caregivers:**
 - Licensed foster care placement (confidential)
 - Prospective adoptive family → adoptive family (confidential), finalized by court order
- **Referral Source:** Permanency planning referral initiated by caseworker (Amy), tracked in C-FIRST!
- **Key Legal/Process Milestones (tracked in C-FIRST!):**
 - CFTMs held to align permanency goal and readiness
 - TPR petition initiated and later completed by court order
 - Adoption petition filed; final adoption order granted
- **Income Information:** No income records are updated against this Adoption case.
- **Permanency Goal / Outcome:** Adoption (Judy legally adopted into her family; prior foster placement closed/end-dated in the system).

Scenario 4: Meet the Ramirez Family

Overview

Sofia Ramirez is a 10-year-old enrolled in the 5th grade. Sofia's family came to the DCS office requesting Relative Caregiver Program (RCP) services after Sofia's mother experienced sudden housing disruption. Sofia's maternal aunt, Marisol Vega, stepped forward as a willing caregiver and requested support while Sofia temporarily resides with her.

We will follow Sofia's case throughout **Module 6: Relative Caregiver Program Eligibility** which includes the **RCP Worker** creating a new RCP Eligibility record, verifying the pre-populated Client Information,

completing the required sections, and calculating eligibility to confirm if Sofia meets requirements for the RCP stipend.

Case Information

- **Case Type:** Treatment Case
- **Program Type:** Relative Caregiver Program (RCP) – Stipend Program
- **Case Persons:** Sofia Ramirez (Child, 10F), Elena Ramirez (Mother, 29F), Marisol Vega (Maternal Aunt / Proposed Relative Caregiver, 35F), Daniel Ramirez (Father / Non-Custodial Parent (NCP), 31M; limited involvement)
- **Referral Source:** Family walk-in at County office requesting RCP services
- **Primary Caregiving Plan:** Sofia placed with maternal aunt Marisol (willing caregiver)

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 remind ourselves what these are and how they impact eligibility outcomes in C-FIRST!

After completing this module, you will be able to:

- Describe case types and foundational eligibility concepts 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 related to eligibility records

Lesson 1: Case Management in C-FIRST!

This lesson provides you with an overview of the case structure in C-FIRST!. Case types in C-FIRST! have changed compared to case types in TFACTS.

Learning Objectives

- Describe the case types in C-FIRST!

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

Lesson 2: Eligibility Fundamentals

This lesson provides you with a brief overview of eligibility concepts in C-FIRST!. These concepts are what drive eligibility determinations and outcomes in our system. Let's get started.

Learning Objectives

- Describe child removal in relation to Eligibility
- Explain judicial determinations and court orders in relation to Eligibility
- Describe child placement and provider information in relation to Eligibility
- Explain funding source and eligibility

Task 1: Eligibility Concepts and Best Practices

Let's go over some basic concepts related to eligibility that we want everyone to understand when it comes to C-FIRST!.

As an Eligibility Worker processing child welfare cases in C-FIRST!, you commonly will need to assess the following information:

- **Child Removal:** This refers to how and when the child enters out-of-home care which is either court-ordered or voluntary.
- **Judicial Determination and Timeliness:** This refers to court orders, custody orders, court hearings and findings.
- **Placement:** This refers to where the child is living under the agency/court's authority and is associated with approved start and end dates, and the responsible placement resource.
- **Providers:** This refers to licensed and approved individuals or organizations that can legally take custody of a child and receive payment and funding for the care that they provide to the child.

When it comes to processing our child welfare cases and updating eligibility information, always remember to:

- Review and validate case information
- Confirm and review the eligible child on the case, the child's person record, program, and the eligible period
- Review all court/custody orders and petitions

- Perform reviews and checks on cases periodically throughout the lifecycle of the case to confirm accurate and timely information is documented

Task 2: Eligibility Automation Overview

Eligibility automation within C-FIRST! can be described real-time batch-processing capability that uses eligibility records together with other case information, such as placement, provider, service, and payment data, to automatically create certain FFPSA and Q RTP eligibility records, as well as IV-E reimbursability records. Some of these batches are scheduled while others are real-time. This process helps reduce manual intervention by translating case and eligibility data entered into the child welfare system into standardized financial records through recurring system runs. These batches take place nightly generating records against the person record in the system.

For Foster Care, eligibility records are not generated through batch processing; a record is work-listed real-time when an Active Custody record is created. A custody record is created for Jordan, and the system generates a task letting an eligibility worker know that the information needs to be reviewed, updated, and eligibility needs to be calculated.

Lesson 3: Eligibility Navigation Overview

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 the **Homepage** and describe its components
- Navigate and search for case information including person, case, court orders, placement, and provider information

Task 1: Identify the Homepage and Components

The **Homepage** for the **Max Specialist** 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.



Process Tip!

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

Task 2: Navigate and 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'll be 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.

This page also gives you access to the **Related Files** section where you can view and upload documents against 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 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. **For staff who are processing IV-E eligibility records; use the steps below to access the Reasonable Efforts court documents.**

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 and Provider 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 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.

Lesson 4: Eligibility & Document Management

This lesson provides you with a brief overview of how to access eligibility records to view and upload documents against the record.

Learning Objectives

- View and upload documents related to eligibility records

Task 1: Access Person Eligibility Record Documents

To access person-specific eligibility records, use the below steps:

1. Navigate to the desired **Person** record from the Homepage.
2. Select the Eligibility hyperlink from the Related List Quick Links. The Eligibility List View displays with the record(s).
3. Click the **Eligibility ID** hyperlink. The **Eligibility Details screen** displays.

Note: Each eligibility record is assigned a unique identifier which displays at the top of this screen.

4. Select the **Attachments** tab. This displays the **Related Files**.
5. Select the **File Name** hyperlink for the document you need to view. The file displays in a new tab and you can view **Preview** and **Details** of the document.



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 documentation related to the eligibility record, you must access person records in the system!

**System Tip!**

Once you access a specific document, the system provides you with **Preview** and **Details** tabs. **Preview** allows you to view the document, and the **Details** tab gives you access to make changes or edit document information such as, the title, the document date, and description.

Task 2: Upload Document to Person Eligibility Record

To upload documents to Person Eligibility Records, use the below steps:

1. Navigate to the desired **Person** record from the Homepage.
2. Select the Eligibility hyperlink from the Related List Quick Links. The **Eligibility List View** displays with the record(s).
3. Click the **Eligibility ID** hyperlink. The **Eligibility Details screen** displays.
4. Select the **Attachments** tab. This displays the **Related Files**.
5. Click on the **Basic File Upload** button. The Upload File screen displays.
6. Enter the **Document Date**.
7. Select the **Document Category** from the drop-down menu.
8. Select the **Document Sub-Category** from the drop-down menu. The options in this category are based on the selection made in the **Document Category** field.

Note: Please continue to follow your business process for selecting appropriate categories or check with your supervisor.

9. Click on the **Upload Files** button and select the file you would like to upload.

Note: You also click the **Drop File** button to drag and drop a file for upload.

10. Enter **Comments** in the text box.
11. Click the **Save** button. The document displays in the **Related Files** section of the screen.

**System Tip!**

Documents are immediately downloaded to your computer unless you have selected a file that exceeds 100 MB. Larger Files are automatically zipped and saves to your Downloads.

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:* To view eligibility records, you must navigate to the Person Details screen.

- A. True
- B. False

Question 4: The Eligibility hyperlink, which allows you to access an eligibility record, is available to you from which page?

- A. The Homepage
- B. The Case Details screen
- C. The Cases tab
- D. The Person Details screen

Question 5: From the Eligibility record, which tab allows you to view/upload documents to the eligibility record?

- A. The Financial Attributes tab
- B. The Attachments tab
- C. The Download Files tab
- D. The Basic File Upload tab

Question 6: *True or False:* You can access Person records from **Cases**, **Person**, and **Global Search Bar**.

- A. True
- B. False

Question 7: *True or False:* Reimbursability records are auto-generated using eligibility and case information.

- A. True
- B. False

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 a Case, 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:

- Search for existing Person Records and interpret search results to prevent duplicates
- Create new Person Records, generate a Person ID (PID), and establish a Person Type
- Edit person demographics including aliases, household information, and photos
- Add and manage addresses using Smarty and maintain address history
- Associate persons to an Investigation Case and assign Case Person roles
- Create Relationship Records between family members
- Designate the Primary Caregiver for assessments

Lesson 1: Searching for Existing Person Records

Before adding any individual to the Dean Case, you must first search C-FIRST! to determine if a Person Record already exists. This prevents

duplicate records and ensures you can access any prior case history. Tulip Dean and her children may have existing records from previous DCS involvement, so thorough searching is essential before creating new entries.

Learning Objectives

- Navigate to the Person Search functionality in C-FIRST!
- Execute searches using multiple search criteria including name, date of birth, and SSN
Note: To add a New Person users will need to fill out the minimum fields including **Race Primary, Date Of Birth Unknown?, Last Name, Gender at Birth, Ethnicity, Race.**
- Interpret search results and identify potential matches
- Recognize when an exhaustive search yields no results

Task 1: Access Person Search from the Investigation Case

Now, let's verify whether the family members already exist in C-FIRST!. Let's begin by accessing the **Person Search** from the case record.

1. Log in to C-FIRST! using your CPS Case Worker credentials. C-FIRST! displays the **Homepage**.
2. Open the **Notifications** list and locate the task, *Intake Analyst assigned you a task. An Investigation has been assigned to you.*
3. Click the **Case ID** hyperlink in the **Navigation Links** section of the notification. C-FIRST! redirects you to the **Case Summary** screen for the Case.
4. Navigate to the **Intake Review** tab and review the **Individuals Involved** section to note the names and identifying information for all persons reported during Intake.
5. Click the **Persons** hyperlink in the **Related List Quick Links** section. C-FIRST! displays the list of Intake Persons and Case Persons currently associated with the Investigation.
6. Click the **Search Case Person** button. C-FIRST! opens the **Search for a Person screen** screen.



System Tip!

The **Person Search** screen allows you to search across all Person Records in C-FIRST!, not just those associated with your current Case. We found over 200,000 duplicate persons in TFACTS that we have tried to remediate. We do not want to create the same situation in C-FIRST! This is why the system will force you to search

for a name/person before you can create a new person record. Always perform a thorough search before creating a new Person Record.

Task 2: Search for an Existing Person Using Name and Date of Birth

You need to search for Tulip Dean (DOB: 6/8/1990). You will use multiple search criteria to verify accurate search.

1. Click the **Last Name** field and enter *last name####*.
2. Click the **First Name** field and enter *first name*.
3. Click the **Date of Birth** field and enter *date of birth*.
4. Click the **Search** button. C-FIRST! executes the search and displays results in the **Search Results** list.
5. Review the search results to identify any potential matches. Note the **Person ID**, **Name**, **Date of Birth**, and **SSN** columns for each result.
6. If a matching record displays, click the **Person Name** hyperlink to open the Person Record and verify the identity. If the person already exists in C-FIRST!, follow the steps in Module 2, Lesson 5: Linking Persons to Cases and Relationships to associate the individual.

Note: The **Match Score** is a percentage displayed on Person Search results indicating closeness of match to existing records; determines whether leadership approval is needed to create a new Person Record. If the match score of a Person Search result is above 85%, the user must seek leadership approval before creating a new Person.

Staff may need to contact the Max Specialist staff for any updates or changes that are needed to person records once the SSN verification is locked. These are instances where workers select that the SSN needs to be verified by the Social Security Administration (SSA). Once SSA verifies the SSN record and this record is locked, all future changes must be sent to the Max Specialist for updates.



Process Tip!

When searching for a person, start with the most unique identifiers such as SSN or exact date of birth. If no results are found, try variations of the name spelling or partial SSN searches.

If your search returns potential matches, C-FIRST! displays a Duplicate Person Warning. This warning alerts you that a person with similar information already exists in the system. Before creating a new person record, you must review each potential match carefully:

- Compare the name, date of birth, and other identifying information with what you know about the individual.
- If you confirm a match, click **Select** next to the matching record to associate the existing person with your case.
- If no results match, you may proceed with creating a new record.

Creating duplicate person records causes data integrity issues and may result in incomplete case histories. Always exhaust your search before creating a new record.

Task 3: Search for a Child Using Limited Information

You need to verify whether Jordan Dean (DOB: 1/1/2009), the child, has an existing record in C-FIRST!.

1. Click the **Clear** button to reset all search fields.
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 **Search** button.
6. If multiple results appear, compare the **Date of Birth** and any available **Address** information to identify the correct person.
7. Click the **down arrow** icon next to the correct Person Record to associate them with the Case. C-FIRST! adds the person as a Case Person.

Task 4: Perform a Search That Returns No Results

During your Investigation of the Dean family, you learned that Derek Dean is involved. Derek has no prior DCS history in Tennessee. You will search for Derek to confirm no existing record exists before creating a new one.

1. Click the **Clear** button to reset all search fields. 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. Any record that has a duplicate record that still needs to be approved must be submitted to a supervisor for approval.

Lesson 2: Creating New Person Records

When a person search confirms no existing record, you must create a new Person Record in C-FIRST!. For the Dean family Investigation, Derek Dean has no prior Tennessee DCS history and requires a new record. Creating accurate Person Records with complete demographic information is critical for Case management, federal reporting, and future Case matching.

Learning Objectives

- Create a new Person Record when no existing record is found
- Enter required demographic fields including name, date of birth, gender, and race/ethnicity
- Generate a Person ID (PID) for the new record
- Create a Person Type record to define the individual's role in the system

Task 1: Initiate New Person Record Creation

Your search for Derek Dean returned no results. Derek is Jordan's dad. You will now create a new Person Record for Derek.

1. From the **Person Search** screen where no results were found, click the **New Person** button. C-FIRST! opens the **New Person** record screen.
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 Unknown?** drop-down and select the required option.
5. Click the **Date of Birth** field and enter *date of birth*.
6. Click the **Gender at Birth** drop-down and select *gender*.
7. Click the **Race** multi-select box and select *race*. Options include:
 - Abandoned
 - American Indian or Alaska Native

- Asian
 - Black or African American
 - Declined
 - Native Hawaiian or Other Pacific Islander
 - White
 - Unknown
8. Click the **Ethnicity** drop-down and select *ethnicity*. Options include:
 - Hispanic or Latino
 - Not Hispanic or Latino
 - Unable to Determine
 9. Complete any additional required fields displayed on the screen.
 10. Click **Save**. C-FIRST! saves the new Person Record and displays the **Person Details** screen.



System Tip!

The **First Name**, **Last Name**, **Date of Birth**, and **Gender** fields are required to save a new Person Record. **Race/Ethnicity** is a federal reporting field and should always be completed when known.



Process Tip!

If your match score is above 85%, you will need to enter the information in the "Justify why this is not a duplicate." Field and select the checkbox marking the record is "Emergency Request?".

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.

Task 2: Generate a Person ID (PID)

After saving the Person Record for Derek Dean, 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 and assigns a unique Person ID and displays it in the **Person ID** field.
3. Note the generated **Person ID** value for your records. This ID will be used to reference the individual throughout the Case.



System Tip!

- C-FIRST! checks against the Social Security Administration Database if you select Yes for the "SSA Validation Required?" field.
- Verified SSNs support accurate identity matching across the system. If a user wants to run a person's SSN against the SSN database, they should answer *Yes* to the SSN validation question. A daily batch will run to verify the reported SSNs and users will see either *Verified* or *Unsuccessful* when they check the following day.

Lesson 3: Editing Person Demographics

Person demographic information must be kept current and accurate throughout an Investigation. For the Dean family case, you may need to update information as you learn more details during interviews. Derek Dean's employment information, Tulip Dean's prior history, and the child's school details all require accurate documentation in the person records.

Learning Objectives

- Access and edit existing person demographic records
- Update required and optional demographic fields
- Document alias and other name information
- Review person record history to track changes

Task 1: Review the Person Summary At-a-Glance View

Before editing a person's demographic information, it is helpful to review the **Person Summary** screen, which provides an at-a-glance view of the most important information about the individual. The **Person Summary** consolidates key details including demographics, active alerts, linked cases, assessments, and relationships into a single view.

1. From the **Case Record**, click the **Persons** hyperlink in the **Related List Quick Links**. C-FIRST! displays the Persons list.
2. Click the required **Case Person ID**. The **Case Person** screen displays.
3. Click on the individual's name to open their person record.
4. Locate the **Person Summary** section and review the summary information including demographics, address and contact information, recent assessments, and relationships.
5. Review any alert or indicators that may be relevant to the Investigation.
6. Scroll down to review additional sections of the person record.

Task 2: Access a Person Record for Editing

You have completed your initial interview with Derek Dean and obtained additional demographic information. Derek's full legal name is Derek David Dean. You need to update his person record with this information.

1. From the **Case Summary** screen, click the **Persons** hyperlink in the **Related List Quick Links** section. C-FIRST! displays the list of Case Persons.
2. Locate the individual in the Case Persons list and click the **Case Person ID**. C-FIRST! opens the **Case Person** record.
3. Click the **Person Name** hyperlink to navigate to the full **Person Details** screen. C-FIRST! displays the complete Person Record.
4. Click the **Details** button above **Individual Characteristics**. C-FIRST! enables editing mode for the Person Record.
5. Click the **Middle Name** field and enter *middle name*.
6. Click **Save**. C-FIRST! saves the updated Person Record and displays a confirmation message.



System Tip!

Changes to person demographic fields are tracked in the **Person History**. You can review who made changes and when by accessing the history related list on the person record.



Process Tip!

Profile indicators provide at-a-glance information about a person's status. The **Substantiated Perpetrator** indicator is especially important during Investigations because it tells you the individual has a prior substantiated finding in the system. Always review these indicators before conducting interviews or making case decisions.

Task 3: Add an Alias or Other Name

Derek's full legal name is Derek David Dean, and he sometimes goes by Davy in some contexts. You need to document this alias in his Person Record.

1. On the **Person Details** screen, click the **Alias/Other Name** hyperlink in the **Related List Quick Links** section. C-FIRST! displays the **Alias/Other Name** related list.
2. Click **New**. C-FIRST! opens the **New Alias/Other Name** screen.
3. Click the **First Name** field and enter *first name*.
4. Click the **Last Name** field and enter *last name####*.
5. Click the **Status** drop-down and select *status*. Options include:
 - Active
 - Inactive

6. Click **Save**. C-FIRST! saves the alias record and returns to the **Alias/Other Name** related list.



Process Tip!

Always document known aliases, maiden names, and nicknames. This enables the person record to be found in future searches regardless of which name variation is used.



System Tip!

When a name change is documented on a Person Record (either through an alias entry or by modifying the legal name fields), C-FIRST! generates a notification to users assigned to active cases involving that person. This provides you with awareness when a person's name changes so you can update related records, documents, and correspondence accordingly.

Task 4: Upload a Photo to a Person Record

C-FIRST! provides staff with the ability to upload photos to person records. Please see below for informational instructions on uploading photos. For the purposes of training, this task is not completed in the classroom.

1. Navigate to the **Case Summary** screen for the case.
2. Click the **Persons** hyperlink in the **Related List Quick Links** section. C-FIRST! displays the list of **Case Persons**.
3. Locate **the individual** in the **Case Persons** list and click his name hyperlink. C-FIRST! opens the **Case Person** record.
4. Click the **Person Name** hyperlink to navigate to the full **Person Details** screen.
5. Click the **Upload Photo** button in the action bar. C-FIRST! opens the **Upload Photo** pop-up window.
6. Click **Upload Image** and select *the file from your computer*.
7. Click **Save**. C-FIRST! uploads the photo and displays it on the person record.



Process Tip!

Contact History provides a comprehensive timeline of all interactions and changes on a person record. This is useful

when picking up a case from another user or when reviewing whether required contacts have been completed.



System Tip!

Attachments uploaded to a person record are accessible from any case the person is associated with. Use person-level attachments for photos and documents that identify or characterize the individual, and case-level attachments for photos and documents specific to a particular Investigation.

Note: Documentation uploaded at the case level can only be accessed from that case.

Lesson 4: Managing Person Addresses and Contact Information

The Dean family resides at 300 Hickory Hollow St, Memphis, TN 38103. You must document all relevant addresses, phone numbers, and email addresses for Case persons.

Learning Objectives

- Create and update Person Address Records
- Document multiple addresses for a single person
- Add phone numbers and email addresses to Person Records
- Review address history to track changes over time

Task 1: Add an Address to a Person Record

You need to document the current address for Derek Dean, who recently moved into the Dean family home.

1. From the **Case Summary** screen for the case, click the **Persons** hyperlink in the **Related List Quick Links** section. C-FIRST! displays the list of **Case Persons**.
2. Locate the individual in the **Case Persons** list and click the name hyperlink. C-FIRST! opens the **Case Person** record.
3. Click the **Person Name** hyperlink to navigate to the full **Person Details** screen.
4. Click the **Person Address** hyperlink in the **Related List Quick Links** section. C-FIRST! displays the **Person Address** related list.
5. Click **New**. The **ADDRESS SEARCH** screen.
6. Click the **Homeless?** drop-down and select *No*.

7. Click the **Address** field and enter *address*.
Note: If the system recognizes the address and you are able to select the address from the address search bar, the address populates below into the address fields.
8. Click the **City** field and enter *city*.
9. Click the **State** drop-down and select *TN*.
10. Click the **Zip Code** field and enter *zip code*.
11. Click **Search**. If an address is found, the city, state, and zip code automatically populate. C-FIRST! saves the address record and returns to the **Person Address** related list.
12. Click **New Address**. C-FIRST! opens the **New Address** record screen.
13. Click **Save**. C-FIRST! saves the address record and the **Person Address** screen displays.
14. Click the **Address Type** drop-down and select the required type. The options in the drop-down are:
 - Business
 - Currently Living With
 - Forwarding
 - Homeless
 - Incident
 - Last Known Address
 - Mailing
 - Primary Residence
 - Removal
 - Residential Facility
 - Secondary Address
 - Temporary
 - Unknown
 - Work
15. Click the **Status** drop-down and select the required status. The options in the drop-down are:
 - Active
 - Inactive
 - Abridged
16. Click the **Start Date** field and enter the required date.
17. Click **Save**. C-FIRST! saves the address record.



System Tip!

Address Type options include *Home, Work, Mailing, and Other*. Select the type that best describes the address purpose. A person can have multiple addresses of different types but can

only have one Primary Address at a time. When you add a new address and mark it as Primary, C-FIRST! automatically removes the Primary designation from the previous address and moves it to Address History. The Primary Address is the address used for correspondence, notifications, and location of the individual.

Task 2: Review Person Address History

C-FIRST! tracks all changes made to address records. You can review the address history to see when addresses were added, modified, or marked as inactive. This is useful for understanding a family's housing stability.

1. From the **Person Address** record you just created, click the **Person Address History** hyperlink in the **Related List Quick Links** section. C-FIRST! displays the **Person Address History** list.
2. Review the History Records showing the **Date**, **Field**, **User**, **Original Value**, and **New Value** columns. **Note:** Each change to the address record is logged with the user who made the change and the timestamp.



System Tip!

The **Person Address** list view has been updated to display only active addresses by default, sorted with the most recent address at the top.

To view inactive or historical addresses, use the list view filter to change from **Active Addresses** to **All Addresses**. This allows you to see the complete Address History including addresses that have been end-dated.

Task 3: Add Phone Numbers to Person Records

You need to document contact phone numbers for Derek Dean. Derek's phone number is 901-555-0183. Having accurate contact information ensures you can reach family members for interviews and case updates.

1. Navigate to the **Person** record for Derek.
2. Click the **Details** link. The **Information** section displays.
3. Scroll down and click the **Mobile Phone Number** field and enter mobile number.
4. Click **Save**. C-FIRST! saves the updated phone number.

Lesson 5: Linking Persons to Cases and Relationships

After creating person records, you must link them to the Investigation Case and document their relationships with other family members. For the Dean family Investigation, you must associate all household members with the case and document how they are related to each other. This relationship information is critical for understanding family dynamics and identifying safety resources.

Learning Objectives

- Associate person records with an Investigation Case as Case Persons
- Assign appropriate roles to Case Persons (Alleged Child Victim, Alleged Perpetrator, Witness, Other Involved)
- Create Relationship Records between family members
- Designate primary and secondary caregivers for assessments

Task 1: Associate a Person with the Investigation Case

You have created a person record for Derek Dean. Now you need to associate him with the Dean family Investigation.

1. From the **Case Summary** screen click the **Persons** hyperlink in the **Related List Quick Links** section. C-FIRST! displays the list of **Case Persons**.
2. Click the **Search Case Person** button. C-FIRST! opens the **Person Search** screen.
3. Click the **First Name** field and enter *first name*.
4. Click the **Last Name** field and enter *last name####*.
5. Click **Search**. C-FIRST! displays the search results.
6. Click **Select** next to the individual's record. C-FIRST! adds them as a Case Person and opens the **Case Person** screen.
7. Click the **drop-down arrow** and select *Associate*. C-FIRST! saves the associated Case Person and displays a confirmation message.



System Tip!

Case Person roles include *Alleged Child Victim*, *Alleged Perpetrator*, *Witness*, *Referent*, and *Other Involved*. Select the role that best describes the person's involvement in the

Investigation. This is a multi-select field that allows multiple roles to be documented per person.

Task 2: View All Cases Associated with a Person

A person may be involved in any type of case (Treatment, Adoption, or Guardianship Cases) from CPS to provider. Viewing all associated cases from the person record gives you a complete picture of the individual's history with DCS, which is essential for making informed decisions during the Dean investigation.

1. From the case record, click the **Persons** hyperlink from the **Related List Quick Links** section. The **Persons** list view displays.
2. Click the required **Case Person ID**. The **Case Person** screen displays.
3. Click the individual name hyperlink. The person record displays.
4. Scroll down to the **Cases** related list on the person record. C-FIRST! displays all cases where the individual is listed as a case person.
5. Review the **Case** list. C-FIRST! displays columns including **Case ID, Case Name, Case Type, Case Status**, and the person's role on each case.
6. If the individual has prior cases, click on a **Case ID** hyperlink to review the historical case details.
7. Click the **Browser Back** button to return to the person record.

Task 3: Create Relationship Records Between Family Members

You must document the family relationships in the Dean Case. Tulip is Jordan's mother and the wife of Derek. Creating Relationship Records helps the system understand family connections for potential placement options and family team meetings.

1. From the **Case Persons** list, click on the individual to open their **Case Person** record.
2. Click the **Person Name** hyperlink to navigate to the full **Person Details** screen.
3. Click the **Relationships** hyperlink in the **Related List Quick Links** section. C-FIRST! displays the **Relationships** related list.
4. Click **New**. C-FIRST! opens the **New Relationship** screen.

5. Click the **Related Person** field to search for and select *Tulip Dean*.
6. Click the **Relationship Type** drop-down and select *relationship type*.
7. Click the **Reciprocal Relationship Type** drop-down and select the required relationship type.
8. Click the **Start Date** field and enter the required start date.
9. Click **Save**.
10. Click **New** again to create another Relationship Record.
11. Click the **Related Person** field to search for and select *the individual*.
12. Click the **Relationship Type** drop-down and select *relationship type*.
13. Click the **Reciprocal Relationship Type** drop-down and select the required relationship type.
14. Click the **Start Date** field and enter the required start date.
15. Click **Save**.



Process Tip!

Relationship Records are bidirectional. When you create a relationship showing Tulip as Jordan's mother, the system also shows Jordan as Tulip's son. You only need to create the relationship once.

Knowledge Check!

Question 1: Before creating a new person record in C-FIRST!, what must you do first?

- A. Generate a Person ID (PID)
- B. Create a Person Type record
- C. Perform an exhaustive person search
- D. Add the person as a Case Person

Question 2: Which field is required to save a new person record?

- A. Middle Name
- B. SSN
- C. Date of Birth or Estimated Age
- D. Email Address

Question 3: What must be created before a person can be associated with an Investigation Case?

- A. An Address Record
- B. A Person Type Record
- C. A Relationship Record
- D. A phone number

Module 3: Foster Care Eligibility

Foster Care Eligibility Determination is a process that begins at Custody and continues throughout a child's time in our care. In this module, we meet Jordan Dean, and his case scenario. This module introduces you to how to process eligibility for Foster Care. We practice how to access case information, person records, and how to update, and calculate eligibility determination, and review calculations. We also discuss on-going eligibility maintenance and updating placement information and confirming funding eligibility.

After completing this module, you will be able to:

- Access your Foster Care Eligibility tasks
- Access Eligibility records
- Update Eligibility records and Add Income Information
- Calculate eligibility
- Review Eligibility Outcomes

Case Scenario: The Dean Family

Let's take a moment to introduce you to **Jordan Dean**.

Background

Jordan is a 17-year-old. Jordan's primary caretaker is Tulip, his mother. His father is the non-custodial parent (NCP) with limited contact. Jordan and Tulip's living situation is not ideal; they are currently "couch surfing" with Tulip's aunt, Mrs. Reed, after they were evicted from their apartment. Jordan arrives to school with bruises discloses that "mom's boyfriend hit me." The school counselor reports the incident.

Safety Decision & Legal Authority

Once DCS receives the referral, a same-day assessment indicates that there is immediate danger due to alleged physical abuse and caregiver neglect. Tulip's statement to DCS includes a denial of the abuse, states that the boyfriend is gone, and she also appeared to be intoxicated. The agency takes immediate action and takes emergency protective custody and places Jordan with his maternal aunt, Mrs. Reed (kinship) that same night. An **Ex Parte Removal Order** (court order for when DCS takes emergency custody) is completed. This

results in the following documentation: intake/referral narrative, safety assessment, custody record, placement agreement, initial placement record, and efforts are made to locate and notify the father.

Court Involvement and Findings

A few days later, a court hearing is held, and the court order gives temporary custody of Jordan to DCS with supervised visitation for Tulip, and the father is ordered to appear in court. **This court order includes documentation that the Contrary to Welfare requirement is met and that Reasonable Efforts were documented.** Once the custody record is created for Jordan, the system generates an eligibility record and an eligibility task (essentially work-listing this eligibility record). Once this record is created, relationship and income information is pulled over automatically, as well. Mrs. Reed is willing to be a caregiver and moves forward with becoming a licensed provider. DCS moves forward a kinship home assessment, background checks, and safety inspections.

Placement & Provider Eligibility

Within the first month, the agency initiates the kinship home assessment, completes background checks, and the safety inspection. The placement and provider are confirmed, and support begins after the license is approved by DCS.

Eligibility Determination & Funding (IV-E)

The case worker receives the case and Jordan's identity is confirmed, household composition is updated, documentation and court orders are uploaded, and placement information is entered. **Based on the data that is collected, the eligibility outcome determines that Jordan is eligible for IV-E Reimbursability for Foster Care services.**

Lesson 1: Foster Care Eligibility Task

Tasks in C-FIRST! are auto created by the system depending on the program, age triggers, and timeline requirements. Staff can also manually add tasks for items outside automatic triggers. Both automated and manual tasks are consolidated into a single task list within the case.

At this point in the lifecycle of Jordan's **Treatment Case** (Foster Care program), since the **Case Worker** has updated the necessary information related to placement and provider information, this case is now ready for an eligibility worker to begin updating eligibility information for Jordan.

As we mentioned earlier when we discussed automation, Foster Care eligibility records are not generated through batch processing; a record is work-listed real-time when an Active Custody record is created. A custody record is created for Jordan and the system generates a task letting an eligibility worker know that the information needs to be reviewed, updated, and eligibility needs to be calculated.

Learning Objectives

- Access your eligibility task

Let's go ahead and access your Foster Care Eligibility task.

Task 1: Access your Foster Care Eligibility Task

To access your tasks, please use the below steps:

1. Access your **Homepage** and navigate to the **Today's Tasks** section of the screen. This section populates with tasks that are assigned to you.

Note: To view all tasks that are assigned to you, access the drop-down carat and select My Tasks from the menu.

2. Select the **Foster Care Eligibility Record Open for 10 Days** task hyperlink. The Task Details screen displays. Review the Task Information section and the Status of the task; make sure to review your due date.

Note:

- Tasks are sent to the **Max Specialist** queue in the system and staff can access **My Tasks** and change the filter view to Max Specialist.
- Tasks that are auto-generated by the system show a Worklisted status.

3. Select the **Edit** button on the top right corner of the screen.
4. Update the **Status** column to Pending.
5. Enter **Comments**.

6. Click **Save**. A successful green message displays at the top of the screen letting you know that the information you entered is now saved.
7. Select the **Related To** hyperlink to access the Eligibility Record that the task is related to. The **Eligibility Record Details screen** displays.

Lesson 2: Update Foster Care Eligibility Record

The **Eligibility Details screen** displays the eligibility record ID and Related List Quick Links. The Quick Links include **Eligibility Financial Attributes** and **Household Members**.

The top right corner of the screen provides you with the **Calculate Eligibility** and the **Correct Eligibility** buttons.

In the **Details** tab, this screen provides the following sections that need to be entered by the Eligibility worker: General Information, Child Information, Citizenship Information, Child Education, Judicial Information, Physically/Constructively, Child Placement, Deprivation, Household Information, Earned Income, Unearned Income, Gross Test- Summary, Needs Test- Summary, Resource Calculation, Eligibility Checklist, Resources/References Used, and the Foster Care Determination section.

Before we get started and begin reviewing Jordan's Foster Care eligibility record, let's take a moment to discuss how the system populates certain data from case information. Many of the fields on the Eligibility Details screen are pre-populated from other case data that has been entered, so a part of your job is to review and validate the information that displays on the record.

Learning Objectives

- Access person record and create Foster Care eligibility record
- Update eligibility record details
- Update an earned income financial attribute on eligibility record

Let's get started!

Task 1: Access Jordan's Person Record

1. Login as Max Specialist and access Jordan's Person record and access the **Eligibility** Quick Link. The **Eligibility** screen displays.
2. Select **New**. The **New Eligibility screen** displays.
3. Select the **Foster Care Eligibility** radio button. The options include:
 - Adoption Eligibility
 - Bright Future Eligibility
 - Bright Futures Program Eligibility
 - Foster Care Eligibility
 - Guardianship Eligibility
 - Medicaid Eligibility
 - Private Adoption Eligibility
 - Relative Caregiver Program Eligibility
 - SSI Eligibility
4. Click **Next**. The New Eligibility: Foster Care Eligibility screen displays.

Task 2: Update the General Information, Child Information, & Citizenship Information

In the **General Information** section of the screen, validate and/or update the following fields.

1. Review the **Eligibility Type** field, this displays as *Foster Care Eligibility*.
2. In the **Legal Status Date** field, enter today's date.
Note: For training purposes, we are using today's date for this field but please refer to you policy guidelines for which date to select based on the case.
3. Review the **Assigned Worker** field, this displays the worker that this eligibility record update is assigned.
4. Review the **Eligibility Status** field, this displays as *Pending*.
5. Review the **Initial Removal from Home Date** field, this displays the date from the Placement record associated with the child.



Process Tip!

Max Specialists can navigate back to a child or young adult's person's record to update or make changes to Name, DOB, SSN, or other information. Eligibility record pages in the system do not allow this information to be updated.

In the **Child Information** section of the screen, review the field. These fields are updated and calculated once the record is saved.

6. Review the **Name** field, this displays the name of the child. This field is not editable.
7. Review the **Date of Birth** field, this field displays the child's birthdate and is not an editable field.
8. Review the **Race** field, this displays the child's race and is not an editable field.
9. Review the **SSN** field, this displays the child's social security number is not an editable field.
10. Review the **Age at Eligibility** field, this populates once eligibility is calculated and displays the age at the time of eligibility determination.
11. Review the **Age at Review** field, this displays the child's age.
12. Review the **Ethnicity** field, this displays the child's ethnicity and is not an editable field.

In the **Citizenship Information** section of the screen, review the fields. These fields are not editable. Some fields are updated and calculated once the record is saved.

13. Review the **Is this Child a US Citizen?** field, this displays information from the child's person record and is not an editable field.
14. Review the **Immigration Status** field, this displays information from the child's person record and is not an editable field.
15. Review the **Proof of Citizenship** field, this displays information from the child's person record and is not an editable field.
16. Review the **Qualified Legal Alien?** field, this displays information from the child's person record and is not an editable field.

Task 3: Update Child Education, Judicial Information, and Physically/Constructively

In the **Child Education** section of the screen, review the following fields. This section is populated based on the case data that is pulled from the **Person Details** (person record) and is not editable.

1. Review the **Is the Child Enrolled in School?** field.
2. Review the **School Status** field.
3. Review the **Current Grade** field.
4. Review the **Other School Type** field.

In the **Judicial Information** section of the screen, validate and update the following fields.



Process Tip!

As a part of this process, please make sure that you review custody records. Navigate to the **Person Record**, access the **Related List Quick Links**, and select the **Custody** hyperlink.

5. In the **AFDC Petition Date** field, enter today's date.
6. Review the **Custody Date** field.
7. Review the **Initial Court Order** field, this displays the initial court order hyperlink. Clicking the **Initial Court Order** hyperlink takes you to the **Details** screen where you can view additional court order details. **Note:** Please note to also review the documents to make sure that the legal requirements are met.
8. In the **Contrary to Welfare?** field, select Yes.
9. In the **Contrary to Welfare Date** field, enter today's date.
10. In the **Reasonable Efforts** field, enter Yes.
11. In the **Reasonable Efforts Date** field, enter today's date.

Note:

- The **Reasonable Efforts** field is one of the markers in the system that helps determine IV-E eligibility and reimbursability for services.
- For the purposes of training, for the **Reasonable Efforts Date** we are entering today's date but remember to refer to your policy guidelines for how date fields should be entered in the system.

12. In the **Subsequent Order Within 60 Days?** field, enter No.
13. In the **Subsequent Order Date** field, leave blank.
14. In the **Date of Hearing** field, leave blank.

In the **Physically/Constructively** section of the screen, validate and update the following fields.

15. In the **Child Removal Status** field, select Yes.
16. In the **Physically/Constructively Removed?** field, select Yes.
17. In the **Legal Guardian Name** field, enter "Tulip Dean"
18. In the **Child Removed from Legal Guardian?** field, select Yes.
19. Review the **Date Last Lived with Legal Guardian** field.

Note: This date is auto-populated and pulled from the Custody record.

Task 4: Update Child Placement, Deprivation, and Household Information

In the **Child Placement** section of the screen, validate and/or update the following fields. These fields are updated and calculated once the record is saved.

1. Review the **Placement ID** field, this displays a system-assigned unique numerical identifier for the placement.
2. Review the **Placement Type** field, this displays the placement type.
3. Review the **Placement Begin Date** field, this displays the placement start date.
4. Review the **Provider** field, this displays the provider that is associated with this placement.
5. Review the **Placement Service Type** field, this displays the placement service type.

In the **Deprivation** section of the screen, validate and update the following fields.

6. In the **Was the Mother in Home?** field, select Yes from the drop-down.
7. In the **Was the Mother Deceased?** field, select No from the drop-down.
8. In the **Mother Date of Death** field, leave date blank.

9. In the **Mother in Home Collecting SSI or OASDI?** field, select No from the drop-down.
10. In the **Mother SSI/OASDI Type** field, leave blank.
11. In the **Child Deprived of Care-Mother?** field, select No from the drop-down.
12. In the **Child Deprivation Reason – Mother** field, leave blank.
Note: This field does not need to be entered when the **Child Deprived of Care-Mother?** field is marked as “No”.
13. In the **Mother Absent?** field, select No from the drop-down.
14. In the **Mother Unemployed/Under Employed?** field, select Yes from the drop-down.
15. In the **Was the Father in the Home?** field, enter No from the drop-down.
16. In the **Was the Father Deceased?** field, select No from the drop-down.
17. In the **Father Date of Death** field, leave blank.
18. In the **Father Collecting SSI or OASDI?** field, select No from the drop-down.
19. In the **Father SSI/OASDI Type** field, leave blank.
20. In the **Child Deprived of Care-Father?** field, select Yes from the drop-down.
21. In the **Child Deprivation Reason – Father** field, select *Continued Absence from Home*. The options include:
 - Continued Absence from Home
 - Death of Both Parents
 - Death of One Parent
 - Incapacity/Disability
 - Incarceration of Both Parents
 - Incarceration of One Parent
 - TPR
 - Unemployment/Under Employer of Principal Wage Owner
 - Unestablished Paternity**Note:** Please do not select “Unestablished Paternity” for this field.
22. In the **Father Absent?** field, select Yes from the drop-down.
23. In the **Yes Unemployed/Under Employed?** field, leave blank.

In the **Household Information** section of the screen, validate and update the following fields.

1. Review the **Total Household Members** field, this displays the total household members.
Note: This information auto-displayed and C-FIRST! pulls data from the **Household Members** page.
2. Review the **Work Expense Deductions** field, this displays \$0.00.
3. Review the **Total Client Resources** field, this displays \$0.00.
4. Review the **Total Lump Sum** field, this displays \$0.00.
5. Review the **Total Earned Income** field, this displays \$0.00.
6. Review the **Dependent Care Deduction** field, this displays \$0.00.
7. Review the **Total Unearned Income** field, this displays \$0.00.



Process Tip!

Eligibility Staff have the ability to include or not include household members for eligibility purposes. Please continue to refer to your policy guidelines for updating household members for eligibility purposes.

The fields below on the **Household Members** screen which is accessible from the **Person Record** allow staff to edit members.

- Deemed Income Rules Apply?
- Include in Income?

Task 5: Update Eligibility Financial Attributes & Review Household Members Quick Links

In our case scenario, Jordan does not have any resources or income information that needs to be added to the eligibility record. In our scenario, **Tulip has a job and makes \$500.00 a month**. This information is updated within **Financial Attributes**.

The worker completes the below steps.

1. Select the **Eligibility Financial Attributes** Quick Link from the **Related List** Quick Links section of the **Eligibility Details screen**. The **Eligibility Financial Attributes** screen displays.
2. Click **New**. The New Eligibility Financial Attributes screen displays.
3. Select the **Earned Income Detail** radio button. The options include:
4. Click **Next**. The New Eligibility Financial Attributes: Earned Income Detail screen displays.
5. Review the **Record Type** field, this displays *Earned Income Detail* based on the selection made on the previous screen.
6. In the **Type** field, select *Wages or Salary*. The options include:
 - Cash Bonus
 - Commissions
 - Disability/Worker's Compensation
 - Income Farm/Non-Farm
 - Jury Duty
 - Railroad Retirement Income
 - Rental Income
 - Self Employed
 - Tips
 - Wages or Salary
 - Worker's Compensation
7. In the **Frequency** field, select *Every 2 Weeks*. The options include:
 - Every 2 Weeks
 - Hourly
 - Monthly
 - Not Applicable
 - Quarterly
 - Twice Monthly
 - Weekly
 - Yearly
8. In the **Eligibility Person** field, select the textbox and select *Jordan Dean* from the list.
9. In the **Work Expense Amount** field, leave blank.
10. In the **Amount** field, enter *\$250.00*.

11. In the **Employer Name** field, enter *Rosehill Gardening Depot*.
12. In the **Dependent Care Amount** field, leave blank.
13. Click **Save**. A green success messages displays at the top of the screen and the record saves.

Next, let's review the Household Members Quick Link, please use the below steps.

14. Select the **Household Members** Quick Link. The **Household Members** screen displays.
15. Review the household members that are associated with Jordan's case.



Process Tip!

Eligibility staff have access to adding new household members by accessing the **New** button from the **Household Members** screen. For training purposes, we will not be adding a new household member.

Lesson 3: Complete Foster Care Record

In this lesson, we continue to process Jordan's eligibility record by updating financial information, reviewing household members, and completing the record.

Learning Objectives

- Update financial attributes and review household members
- Complete the eligibility checklist
- Calculate eligibility

Task 1: Review & Validate Earned Income, Unearned Income, Gross -Test Summary, Needs Test Summary, and the Resource Calculation

In the **Earned Income** section of the screen, validate and/or update the following fields.

1. Review the **Total Earned Income** field, this displays \$0.00.
2. Review the **Wage Earner Disregards Apply?** field, this displays No.
3. Review the **Wage Earner Disregards** field, this displays \$90.00.

4. Review the **Child Care Disregard Apply?** field, this displays No.
5. Review the **Child Care Disregard** field, this displays \$0.00.

In the **Unearned Income** section of the screen, validate and update the following fields.

6. Review the **Total Unearned Income** field, this displays \$0.00.
7. Review the **Child Support?** field, this displays No.
8. Review the **Stepparent Earned Income** field, this displays No.
9. Review the **Monthly Alimony/Child Support Stepparent** field, this displays No.
10. Review the **Standard of Need for Stepparent Family** field, this displays No.
11. Review the **Stepparent Family Household Size**, this displays 0.
12. Review the **Child Support** field, this displays \$0.00.
13. Review the **Stepparent Earned Income Disregards** field, this displays \$0.00.
14. Review the **Stepparent Alimony/Child Support Amount** field, this displays \$0.00.
15. Review the **Standard Need Amount for Stepparent** field, this displays \$0.00.

In the **Gross-Test Summary** section of the screen, validate and update the following fields.

16. Review the **Countable Earned** Income field, this displays \$500.00.
17. Review the **Total Countable Income**, this displays \$500.00
18. In the Is the **Income Less than Gross Test?** field, this displays Yes.
19. Review the **Countable Unearned Income** field, this displays \$0.00.
20. Review the **Gross Test Amount**, this displays \$0.00

In the **Needs Test Summary** section of the screen, validate and update the following fields.

21. Review the **Countable Earned** Income field, this displays \$100.00.
22. Review the **Total Countable Income**, this displays \$100.00

23. Review the Is the **Income Less than Gross Test?** field, this displays Yes.
24. Review the **Countable Unearned Income** field, this displays \$200.00
25. Review the **Gross Test Amount**, this displays \$0.00

In the **Resource Calculation** section of the screen, validate and update the following fields.

26. Review the **Total Resource** field, this displays \$0.00.
27. Review the **Vehicle** field, this displays \$0.00.
28. Review the **Are Resources less than Resource Limit?** field, this displays Yes.
29. Review the **Burial Fund** field, this displays \$0.00.
30. Review the **Total Countable Resources** field, this displays \$0.00.
31. Review the **Total Lump Sum** field, this displays \$0.00.

Task 2: Complete the Eligibility Checklist & Select Resources

Complete the following in the Eligibility Checklist for Jordan's case.

1. Select the checkbox for the **Child Removal Status** field.
2. Select the checkbox for the **Court Order** field.
3. Select the checkbox for the **Reasonable Efforts** field.

Complete the following for Resources/References Used:

1. Select the checkbox for the **DCS** field.



Process Tip!

Max Specialists can check EBMS, Department of Labor and Workforce Development (DLWD), and TCSES Interfaces by accessing the applicable **Case Person** screen. This screen provides the **Check SNAP-TANF**, **Check Wage/Unemployment**, and **Check Child Support** buttons.

Task 3: Calculate Eligibility

1. Scroll to the top of the screen and click the **Calculate Eligibility** button to calculate Jordan's eligibility. A green success message displays.

2. Scroll to the **Foster Care Determination** section of the page and review the Standard Eligibility Determination field. This field displays as "IV-E Eligible".
3. Select the **Eligibility Status** field and select *Completed*.

Task 4: Review Reimbursability Records

Complete the following to review Jordan's IV-E Reimbursability information.

1. Navigate to Jordan's **Person Record** screen.
2. Access the **Related List Quick Links**.
3. Select the **IV-E Reimbursability Tracking** hyperlink. The **IV-E Reimbursability Tracking List View** displays.
4. Select the **IV-E Reimbursability Tracking Name** hyperlink to view the record. The **IV-E Reimbursability Tracking** details screen displays.
5. Review the **Details** tab which provides the following sections: *Child Information, Child Placement, Reasonable Efforts, Eligibility, Navigation Links, and System Information*. **This record reflects that Jordan is IV-E Reimbursable.**

Knowledge Check!

Question 1: On the **Homepage**, where do the tasks assigned to a worker typically appear?

- A. Today's Task section
- B. Case Notes section
- C. Recently Viewed Attachments
- D. Analytics section

Question 2: Which action is used to run the system's eligibility computation on the record?

- A. Correct Eligibility
- B. Calculate Eligibility
- C. Export Eligibility
- D. Clone Eligibility

Question 3: Which statement is TRUE?

- A. The eligibility worker must always create the eligibility record manually

- B. Eligibility records can only be created by supervisors
- C. A nightly batch creates eligibility records and notifications are generated for workers to review the record
- D. Eligibility records are created only after approval

Question 4: Which statement is TRUE about financial attributes and household members quick links?

- A. They are unrelated to eligibility decisions
- B. They provide access to financial records and household member information used in eligibility
- C. They are only visible to case managers
- D. They only display data after approval

Module 4: Bright Futures Eligibility

This module discusses the process for Bright Futures eligibility in C-FIRST!. Young adults are between the ages of 18 and 23 and must be engaged in school and other qualifying activities.

After completing this module, you will be able to:

- Explain the purpose of Bright Futures eligibility activities in C-FIRST!
- Access and manage Bright Futures eligibility-related tasks
- Update key sections of a Bright Futures eligibility record
- Review eligibility information to support record accuracy and completeness
- Complete the eligibility checklist and select appropriate resources
- Calculate and review eligibility results

Case Scenario: The Dean Family (Part 2)

You are already familiar with **Jordan Dean**. Jordan turns 18 and enters into Bright Futures For the purposes of training, we continue to work with Jordan Dean and his scenario as he progresses into Bright Futures. Jordan also provides **does not provide Voluntary Placement Agreement (VPA)**. In this scenario, Jordan is IV-E eligible and there is also a court order for reasonable efforts. Since this is a case scenario where Jordan continues from Foster Care into Bright Futures,

This scenario begins at the point where the **Bright Futures Program Eligibility** record is created in the system, this means that the **Network Development Team** has completed the **Placement** record for Jordan related to Bright Futures. In our scenario, Jordan Dean is 18, has graduated from high school, and has enrolled in a community college.

Lesson 1: Bright Futures Program Eligibility

This lesson begins with learning how to complete a **Bright Futures Program Eligibility** record for Jordan in C-FIRST!. This record is created by the **Independent Living Specialist**. Please note that at this point in the scenario, the **Network Development Team** has already created the Placement record.

Learning Objectives

- Create a Bright Futures program eligibility record

Task 1: Create Bright Futures Program Eligibility Record

1. Login as the **Independent Living Specialist**.
2. Navigate to Jordan's person record to access the **Person Details** screen.
3. Access the **Related List Quick Links** and select the **Eligibility** hyperlink. The **Eligibility List View** displays.
4. Click **New**. The **New Eligibility** pop-up displays.
5. Select the "*Bright Futures Program Eligibility*" radio button.
6. Click **Next**. The **New Eligibility: Bright Futures Program Eligibility** screen displays.
7. Navigate to the **Bright Futures Program Eligibility Calculations** section.
8. In the **Employed at Least 80 Hours Per Month?** drop-down, select *No*.
9. In the **In a Program for Promoting Employment?** field drop-down, select *No*.
10. In the **Meets Special Needs Requirements?** field, drop-down, select *No*.
11. In the **10K or Less in Available Resources?** field, drop-down select *Yes*.
12. Click **Save**.
13. The **Bright Futures Program Eligibility** record displays. This record includes the Approval History hyperlink for staff to access to view approval history for the record.
14. Click the **Calculate Eligibility** button and review the results.
15. Click the **Submit for Approval** button.

Lesson 2: Bright Futures Eligibility Task

In this lesson, we are now ready to begin updating our eligibility record for Jordan related to his Bright Futures services.

Learning Objectives

- Access Bright Futures Eligibility task

Let's keep going.

Task 1: Access your Bright Futures Eligibility Task

To access your tasks, please use the below steps:

1. Log in as the **Max Specialist**. Access your **Homepage** and navigate to the **Today's Task** section of the screen. This section populates with tasks that are assigned to you.
Note: To view all tasks that are assigned to you, access the drop-down and select My Tasks from the menu.
2. Select the **Bright Futures Eligibility Record Open for 10 Days** task hyperlink. The **Task Details** screen displays. Review the Task Information section and the status of the task; make sure to review your due date.
Note: Tasks that are auto-generated by the system show a *Worklisted* status.
3. Select the **Edit** button on the top right corner of the screen.
4. Update the **Status** column to Pending.
5. Enter **Comments**.
6. Click **Save**. A successful green message displays at the top of the screen letting you know that the information you entered is now saved.
7. Select the **Related To** hyperlink to access the Eligibility Record that the task is related to. The **Eligibility Record Details screen** displays.

Lesson 3: Update Bright Futures Eligibility Record

In this lesson, we begin to update Jordan's Bright Futures eligibility record. This record is not the same as the Bright Futures Program Eligibility record.

Let's get started.

Learning Objectives

- Explain how to access Person Records
- Explain how to update eligibility record details

Task 1: Access Jordan's Person Record

1. Access Jordan's Person record and access the **Eligibility** Quick Link. The **Eligibility** screen displays.
2. Select the **Eligibility ID** hyperlink for the applicable record. The **Eligibility Details** screen displays.
Note: The Eligibility Type shows as "*Bright Futures Eligibility.*"
3. Select the **Edit** icon and being to review/update information.

Task 2: Update the General Information, Child Information, & Citizenship Information

In the **General Information** section of the screen, validate and/or update the following fields.

1. Review the **Eligibility Type** field, this displays as *Bright Futures Eligibility*.
Note: The **Bright Futures Effective Date** field displays once the record is saved; this date displays Jordan's 18th birthdate.
2. Review the **Eligibility Status** field, this displays *Pending*.
3. Review the **Assigned Worker** field, this displays the worker that this eligibility record is assigned to.

In the **Child Information** section of the screen, validate and update the following fields.

4. This section contains the following fields: **Name**, **Date of Birth**, **Race**, **SSN**, **Age**, and **Ethnicity**. These fields populate once the record is saved.

Note: Please proceed to the next section to enter case information.

In the **Citizenship Information** section of the screen, validate and update the following fields.

5. Review the Is the **Child a US Citizen?** field, this displays Yes since Jordan is a citizen.
6. Review the **Qualified Legal Alien?** field, this displays No.
Note: The **Immigration Status** field is populated once the record is saved; some fields may not display data due to case information previously not entered.

Task 3: Update the Child Education, Technical Requirements, and Judicial Information

In the **Child Education** section of the screen, review the following fields. This information is carried over from the information that the Independent Living Specialist has updated within Jordan's Person records.

1. Review the **Child Enrolled in School?** field.
2. Review the **School Status** field.
3. Review the **Current Grade** field.
4. Review the **Other School Type** field.

In the **Technical Requirements** section of the screen, validate and/or update the following fields.

5. In the Enrolled in **High School or Equivalent?** field, select *Yes* from the drop-down.
6. In the **Employed at Least 80 Hours Per Month?** field, select *Yes* from the drop-down.
7. In the **Meets Special Needs Requirements?** field, select *No* from the drop-down.
8. In the **Enrolled in Post-Secondary School?** field, select *No* from the drop-down.
9. In the **Program or Promoting Employment?** field, select *No* from the drop-down.
10. In the **Resided in TN During Eligibility?** field, select *Yes* from the drop-down.

In the **Judicial Information** section of the screen, validate and/or update the following fields.

11. In the **AFDC Eligibility Month** date field, enter today's date.
12. In the **VPA Date** field, enter today's date.
13. In the **Best Interest Finding?** field, select *Yes* from the drop-down.
14. Review the **Court Order** field.
15. Review the **Court Order Date** field.
16. Review the **Reasonable Efforts-Last Court Order?** field.
17. Review the **Reasonable Efforts Date** field.

Note: Since Jordan is entering Bright Futures through the VPA pathway, court order information does not appear and will not

need to be populated. This scenario also does not require Reasonable Efforts. Please continue to reference your policy guidelines.

Task 4: Update the Child Placement, Independent Living Allowance, and Household Information

In the **Child Placement** section of the screen, validate and/or update the following fields.

1. This section contains the following fields: **Placement ID**, **Placement Type**, **Placement Begin Date**, **Provider**, and **Placement Service Type**. These fields populate once the record is saved. **Note:** *This reflects the placement information that is updated on this case; please review placement information.*

In the **Independent Living Allowance** section of the screen, validate and/or update the following fields.

2. Review **Independent Living Allowance?** And **Begin Date** fields. **Note:** *These will remain blank as this Bright Futures case does not have an ILA allowance for Jordan.*

In the **Household Information** section of the screen, validate and/or update the following fields.

3. Review the **Total Household Members**, **Total Client Resources**, **Total Lump Sum**, **Total Earned Income**, **Total Unearned Income**, and **Exclude Earned & Unearned Income** fields.
Note: *The **Household Information** section of the screen for Bright Futures cases only show the child. The child either has an Independent Living allowance or an Independent Living placement (not both). Please continue to refer to your Policy Guidelines for more information.*

Task 5: Update Resources as Financial Attribute

In our case scenario, Jordan has resources and income that needs to get added. Jordan has **\$650.00 in a Checking Account** and, also owns a **car that is worth \$3,500.00**. This information is updated within Financial Attributes.

1. Navigate to the **Eligibility Record** screen to access the **Related List Quick Links**.
2. Click the **Eligibility Financial Attributes** hyperlink. The **Eligibility Financial Attributes List View** displays.
3. Click **New**. The **New Eligibility Financial Attributes** screen displays.
4. Select the "Resource Detail" radio button.
5. Click **Next**. The **New Eligibility Financial Attributes: Resource Detail** screen displays.
6. Access the **General Information** section.
7. In the **Type** field, select the "Checking/Savings" option.
8. In the **Eligibility Person** field, enter "Jordan Dean".
9. In the **Amount** field, enter \$650.00.
10. Click **Save**. The record displays for the "Checking/Savings" resource that we just added. Please review the record.
Next, we want to add Jordan's **vehicle information** as a resource for this eligibility record.
11. Navigate back to the **Eligibility Record** screen to access the **Related List Quick Links**.
12. Click the **Eligibility Financial Attributes** hyperlink. The **Eligibility Financial Attributes List View** displays.
13. Click **New**. The **New Eligibility Financial Attributes** screen displays.
14. Select the "Resource Detail" radio button.
15. In the **Type** field, select the "Vehicle" option.
16. In the **Eligibility Person** field, enter "Jordan Dean".
17. In the **Amount** field, enter \$3,500.00.
18. Click **Save**. The record displays for the "Vehicle" resource that we just added. Please review the record.

Task 6: Review & Validate Earned Income, Gross -Test Summary, Needs Test Summary, and the Resource Calculation

In the **Earned Income** section of the screen, validate and/or update the following fields.

1. Review the **Total Earned Income** field, this displays blank.

2. Review the **Wage Earner Disregards Apply?** field, this displays blank.

In the **Gross Test Summary** section of the screen, validate and/or update the following fields.

3. Review the **Countable Earned Income** field, this displays \$0.00.
4. Review the **Total Countable Income** field, this displays \$0.00.
5. Review the **Is Income Less than Gross Test?** field, this displays \$0.00.
6. Review the **Countable Unearned Income** field, this displays \$0.00.
7. Review the **Gross Test Amount**, this displays \$0.00.

Note: These fields populate based on the **Financial Attributes** that are saved against the eligibility record.

In the **Needs Test- Summary** section of the screen, validate and/or update the following fields.

8. Review the **Countable Earned Income** field, this displays \$0.00.
9. Review the **Total Countable Income** field, this displays \$0.00.
10. Review the **Countable Unearned Income** field, this displays \$0.00.
11. Review the **Gross Test Amount** field, this displays \$0.00.

In the **Resource Calculation** section of the screen, validate and/or update the following fields.

12. Review the **Total Resources** field, this displays \$4,150.00.
13. Review the **Vehicle** field, this displays \$3,500.00.
14. Review the **Are Resources less than Resource Limit?** field, this displays Yes.
15. Review the **Burial Fund** field, this displays \$0.00.
16. Review the **Total Countable Resources** field, this displays \$4,150.00.
17. Review the **Total Lump Sum** field, this displays \$0.00.

Lesson 4: Complete Bright Futures Eligibility Record

In this lesson, we begin to finalize our eligibility record, submit for approval and lastly, approve the record.

Learning Objectives

- Complete Eligibility Checklist
- Calculate and review eligibility information

Task 1: Complete the Eligibility Checklist & Select Resources

Complete the following in the Eligibility Checklist for Jordan's Bright Futures eligibility record.

1. Select the checkbox for the **Child Removal Status** field.
2. Select the checkbox for the **Court Order** field.
3. Select the checkbox for the **Reasonable Efforts** field.

Complete the following for **Resources/References Used**:

4. Select the checkbox for the **DCS** field.

Review the **Bright Futures Determination** section of the screen.

5. Review the **Standard Eligibility Determination** field, this displays IV-E Eligible.
6. Review the **Eligibility Determination Date** field, this displays the date the eligibility was determined.
7. Review the **Override Determination** field, this displays *No Determination Made*.
8. Select **Save**. A success message displays at the top of the screen and Jordan's eligibility record is saved.

Task 2: Calculate & Review Eligibility Results

1. Scroll to the top of the screen and click the **Calculate Eligibility** button to calculate Jordan's eligibility. A green success message displays.
2. Scroll to the **Bright Futures Determination** section of the page and review the Standard Eligibility Determination field. This field displays as "IV-E Eligible".
3. Select the **Eligibility Status** field and select *Completed*.

Task 3: Review Reimbursability Records

Complete the following to review Jordan's IV-E Reimbursability information.

1. Navigate to Jordan's **Person Record** screen.
2. Access the **Related List Quick Links**.
3. Select the **IV-E Reimbursability Tracking** hyperlink. The **IV-E Reimbursability Tracking List View** displays.
4. Select the **IV-E Reimbursability Tracking Name hyperlink to view the record**. The **IV-E Reimbursability Tracking Details** screen displays.
5. Review the **Details** tab which provides the following sections: *Child Information, Child Placement, Reasonable Efforts, Eligibility, Navigation Links, and System Information*. **This record reflects that Jordan is IV-E Reimbursable.**

Knowledge Check!

Question 1: Which statement is TRUE about Bright Futures eligibility tasks?

- A. They are only visible on the eligibility record, not on the homepage
- B. You cannot edit task status
- C. Auto-generated tasks may show a Worklisted status
- D. The "Related To" link opens the case agreement screen

Question 2: Where are Bright Futures eligibility records located?

- A. Located on Case Details screen
- B. Located on the Person Details screen
- C. Located on the Attachments tab
- D. Located on the Placement Details screen

Question 3: *True or False:* Completing the Eligibility Checklist is mandatory.

- A. True
- B. False

Module 5: Adoption Services Eligibility

Eligibility Determination for Adoption Assistance refers to the criteria that must be met for a child and their family to receive adoption assistance. This program is designed to help adoptive parents meet a child's varied, and often costly, needs by providing monthly maintenance payments, medical assistance, and other support. Once the child's assistance eligibility is determined, the state enters into an agreement with the adoptive parents to deliver these benefits.

After completing this module, you will be able to:

- Explain the purpose of Adoption Services eligibility activities in C-FIRST!
- Describe the steps for creating, updating, submitting, and approving an adoption eligibility record
- Create and manage adoption case agreements using the required workflow
- Apply adoption eligibility and case agreement processes to complete key case activities

Case Scenario: The Garcia Family

You are also familiar with **Judy Garcia**.

Background

Judy Garcia is a 7-year-old child with an open Treatment Case in C-FIRST!. Her **Case Manager**, Amy, and the team document ongoing safety concerns, family background, Judy's parents, and other household members. As information is gathered and documented over time, the team determines that reunification is not possible. Amy initiates the required prework to explore potential living arrangements and creates the Permanency Committee Referral in the **Treatment Case** to support next-step permanency planning.

Safety Decision & Legal Authority

As safety concerns continue to be documented, the team's assessment supports a permanency direction focused on adoption rather than reunification. The decision is made to pursue Termination of Parental Rights (TPR), and the TPR petition is tracked in C-FIRST!

with supporting documentation and required case activity maintained as part of the Treatment Case record.

Court Involvement and Findings

The assigned attorneys document the TPR petition and related court activity in C-FIRST!, and the court ultimately issues an order completing TPR. Following that court outcome, the team proceeds with adoption planning steps and prepares to transition permanency responsibilities in the system through formal referral and case creations.

Permanency Referral & Adoption Planning (CFTMs and Case Activity)

After TPR is completed, a Permanency Case Referral is created in C-FIRST! and assigned to the Permanency Specialist Supervisor, who then creates and assigns the Permanency Case to the Permanency Specialist. Adoption planning begins and is organized through Adoption Case Activity, with documentation and outreach maintained in the related lists. As the adoption progresses and an adoptive family is identified for Judy, the Permanency Specialist creates the eligibility record. After the eligibility records is approved, the Permanency Specialist creates the case agreement and secures approval.

Adoption Petition, Finalization, and Post-Adoption Record Actions

The Permanency Specialist creates the Adoption Petition on the Permanency Case, which generates associated work (including an Adoption Court Order and Hearing record). Before finalization, the youth's adoption information record is created and the adoptive parent is added as a person involved on the case. After the judge issues the final adoption court order, the team updates records and completes post-finalization steps in C-FIRST!, including:

- Updating the Court Order record with court details and decision (Adoption Granted)
- Using Create Post Adoptive Person to generate the post-adoptive child/person record, generate the PID, and complete Post Adoption Information
- Finalize Case Agreement

- End-dating any active placements, updating the case record, and adding the post-adoptive person to the Adoption Case as a Case Person
- Sealing the adopted youth on the Treatment Case and restricting the Permanency Case, per the process

Once the adoption requirements are complete and the case agreement is finalized, the workflow closes with Judy legally adopted into her new family, and the Adoption Case is created and linked to the Permanency Case in C-FIRST!.

Lesson 1: Determining Eligibility for Adoption

In this lesson, we will learn about how to create an eligibility record for Judy to determine her eligibility for adoption.

Learning Objectives

- Explain the purpose of the adoption eligibility record
- Create an adoption eligibility record in C-FIRST!
- Update the eligibility record and calculate eligibility results
- Submit and approve the eligibility record

Task 1: Create Adoption Eligibility Record

1. Log in as the **Permanency Specialist**, and from the **Homepage**, click the **Home** drop-down and select **Person**. The **Recently Viewed Person** screen displays.
2. Click *Judy Garcia*. The **Person** screen displays.
3. Click the **Eligibility** hyperlink from the **Related List Quick Links** section. The **Eligibility** screen displays.
4. Click **New** to add a new Adoption eligibility record. The **New Eligibility** pop-up displays.
5. Click the **Adoption Eligibility** radio button to capture the eligibility details and then click **Next**. The **New Eligibility: Adoption Eligibility** pop-up displays.
6. Navigate to the **General Information** section. Click the **Subsidy Review Effective Date** field and enter *a date*.
7. Click the **Legally Free for Adoption?** drop-down and select *Yes*.

8. Click the **Assigned Worker** field and select **Permanency Specialist**.
9. Scroll to the bottom of the page and click **Save**. The **Adoption Eligibility** record screen populates.
10. Click the **Eligibility Status** drop-down, this displays as Pending.
11. Click **Save**. The Eligibility record is saved.
12. In the **Subsidy** tab, scroll down to the **Special Needs** section. Click the **pencil** icon. This section has the following fields. Please select Yes/No for the below.
 - Disability Which Substantially Limits?
 - Behavioral/Emotional Disorder?
 - Minority Race/Ethnicity, Age 2+?
 - Sibling Group?
 - Severe Abuse?
 - Deferred: Genetic/Medical History?
 - Deferred: 3+ Disrupted Placements?
 - Deferred: Neonatal Abstinence Syndrome?
 - Intellectually Disabled?
 - Moderate-Severe Condition with Treatment
 - Caucasian, Age 9+?
 - 3+ Consecutive Years in DCS Custody?
 - SSI Medical/Disability Requirement?
 - Deferred: Prenatal Exposure to Toxins?
 - Deferred: Safe Haven?
13. Click the **Severe Abuse?** drop-down and select Yes.
14. Scroll to the **Reasonable Efforts** section. Select Yes or No for all applicable fields.
 - Foster Parent Adoption?
 - Required Recruitment Efforts?
 - Identified Pre-Adoptive Families?
 - Relative Adoption?
15. Scroll down to the **Medical/Rehabilitative Care Needs** section.
16. Click the **Medical/Rehabilitative Care Needs?** drop-down and select Yes.
17. Click the **Medical/Rehabilitative Care Needs Detail** field and enter the required details.

18. Click the **Eligibility Status** drop-down and select *Eligibility*. The options in the drop-down are:
 - Abridged
 - Completed
 - Determined
 - Eligibility
 - Modified
 - Pending
 - Worklisted
19. Click **Save**. The record is saved. **Note:** When the above status is updated to "Eligibility"; this triggers the task in the system for the **Max Specialist** to complete the eligibility record.



Process Tip!

C-FIRST! includes different show and hide logic for eligibility records based on whether it is an initial record, or a record that has been submitted and is being reviewed. What this means is that the fields that appear on eligibility records are dependent on whether it is a "initial" record versus a "review" record; a record that has been previously submitted is either being reviewed or updated.

Task 2: Determining Eligibility

Once the **Permanency Specialist** marks the **Eligibility Status** as *Eligibility*, a task is generated for the **Max Specialist** to determine eligibility.

1. Log in as the **Max Specialist**, and from the **homepage**, click the **Notifications** icon. A list of notifications displays.
2. Click the **Adoption Eligibility Pending Eligibility Determination** notification. The Eligibility record screen displays.
3. Click the **Eligibility** tab. Navigate to the **Fostering Connections** section.
4. Click the **pencil** icon and respond with Yes or No. This section has the following fields:
 - Legal Status?
 - Child of a Minor Parent?

- Meets SSI Medical or Disability?
 - Prior Eligibility for Adoption Assist?
5. Scroll down to the **Standard Eligibility** section. This section has the following fields:
 - Previous receipt of Adoption Assist?
 - SSI Medical and Financial Requirements
 - Meets July 16, 1996, AFDC Requirements?
 - Child of Minor IV-E Parent
 6. Click the **Previous receipt of Adoption Assist?** drop-down and select *No*.
 7. Scroll down to the **Adoption Determination** section. Please select Yes or No for the fields in this section. The section has the following fields:
 - Fostering Connections Eligible?
 - Standard Eligibility Determination
 - Eligibility Determination Date
 - Removal Court Order Uploaded?
 - Override Determination
 - Override Reason
 - Notes
 8. Click **Save**. The record is saved.
 9. Scroll up and click **Calculate Eligibility**. A message displays that eligibility has been calculated successfully and the result is displayed in the **Fostering Connections Eligible?** and **Standard Eligibility Determination** field.
 10. Login as the **Subsidy Specialist**. Click the **Subsidy** tab. The **General Information** section displays.
 11. Click the **Edit** icon next to the **Eligibility Status** field. The fields become editable.
 12. Click the **Eligibility Status** drop-down and select *Determined*.
 13. Scroll down to the **Reasonable Efforts** section. This section has the following fields:
 - Foster Parent Adoption?
 - Required Recruitment Efforts?
 - Identified Pre-Adoptive Families?
 - Relative Adoption?
 14. Click **Save**. The record is saved.

Note: When eligibility needs to be re-run for continued eligibility, the above steps need to be followed. However, since

there is an existing initial eligibility record, the screen is updated to reflect a "review" eligibility record.

Task 3: Submit the Eligibility Record

Once the **Max Specialist** determines eligibility and updates the status to *Determined*, a task is generated for the Permanency Specialist to submit the record for approval.

1. Log in as the **Permanency Specialist**, and from the **homepage**, click the **Notifications** icon. A list of notifications displays.
2. Click the required notification. The **Eligibility** record screen displays.
Note: Once the **Eligibility Status** is updated to *Determined*, the **Submit for Approval** button displays.
3. Click the **Approver** field and enter the *Subsidy Supervisor*.
4. Click **Submit for Approval**. The **Submit for Approval** pop-up displays.



Process Tip!

Once the Supervisor provides the necessary approvals to the Eligibility request, update the **Eligibility Status** to *Completed*. The record cannot be edited anymore. To edit, click the **Correct Eligibility** button to create a clone of the existing Eligibility record and make the necessary edits to it.

5. Click the **Comments** field and enter the required comments.
6. Click **Submit**. The Eligibility record is routed to the Supervisor for approval.

Task 4: Approve the Eligibility Record

1. Log in as the **Subsidy Supervisor**, and from the **Homepage**, click the **Notifications** icon. A list of notifications displays.
2. Click the *Permanency Specialist is requesting approval for eligibility* notification. The **Approval Request** screen displays.
3. Access the Eligibility Record and update the Eligibility Status to "Completed."
4. Click **Approve**. The **Approve Eligibility** pop-up displays.
5. Click the **Comments** field and enter the required comments.
6. Click **Approve**. The approval request is approved.

Lesson 2: Managing Adoption Case Agreements

In this lesson, we continue with the adoption process for Judy by creating case agreements.

Learning Objectives

- Create an adoption case agreement in the system
- Submit and approve the case agreement using the required process

Task 1: Create Adoption Case Agreement

1. Log in as the as a **Permanency Specialist** and from the Home drop-down, click the **Cases** tab. The **Recently Viewed Cases** screen displays.
2. Click the desired **Permanency Case ID**. The case record displays.
3. Click the **Case Agreements** hyperlink from the **Related List Quick Links** section. The Cases Agreements List View displays details such as the Case Agreement ID, Agreement Type, Agreement Start Date, and Last Modified Date.
4. Click **New** to create a new case agreement for the Adoption case.
5. Select **Adoption Case Agreement** radio button and click **Next**. **The New Case Agreement: Adoption Case Agreement** pop-up displays.
6. Click the **Case Person ID** field and enter *Judy Garcia*.
7. Click the **Adoption Subsidy Agreement Type** drop-down and select *Active* to indicate status of the adoption subsidy agreement. The options in the drop-down are:
 - Active
 - Deferred
8. Click the **Rate Type** drop-down and select *Regular 0-11* to indicate the rate type. The options from the drop-down are:
 - Extraordinary 1
 - Extraordinary 2
 - Extraordinary 3
 - Regular 0-11
 - Regular 12-20

- Special Circumstances Rate 0-11
 - Special Circumstances Rate 12-20
9. Click the **Rate Schedule** drop-down and select *Current Rate Schedule* the required option. The options in the drop-down are:
 - Current Rate Schedule
 - Rate schedule from the most recent Finalized Case Agreement.
 10. Click the **Agreement Status** drop-down and select *Pending*. The default option is *Pending*. The options in the drop-down are:
 - Abridged
 - Completed
 - Finalized
 - Pending
 - Withdrawn
 11. Click the **Agreement Start Date** field and enter *today's date*.
 12. Click the **Agreement End Date** field and enter *a future date*.
 13. Click the **Contract Cost Limit** drop-down and select *No*.
 14. Click the **Eligibility End Date** field and enter *3/1/2034*.
 15. Scroll down to the **Provider Information** section.
 16. Click the **Last Name/Organization Name** field and enter the required provider name.
 17. Scroll down to the **Initial Approval** section and select the **Supervisor**.

Note: The Supervisor updates the Initial Approval Action Status at the time of approval.
 18. Click **Save**. The record is saved and the **Case Agreement** screen displays.

Task 2: Submit the Case Agreement

1. Click **Submit for Approval** on the **Case Agreement** screen. The **Submit for Approval** pop-up displays.
2. Click the **Comments** field and enter the required comments.
3. Click **Submit**. The approval request is routed to the Supervisor for approval.

Task 3: Approving the Case Agreement

1. Log in as the **Permanency Supervisor**, and from the homepage, click the **Notifications** icon. A list of notifications displays.
2. Click the *Permanency Specialist is requesting approval for case agreement* notification. The **Approval Request** screen displays.
3. Click the **Related To** hyperlink. The **Case Agreement** record displays.
4. Scroll down to the **Initial Approval** section.
5. Click the **Initial Approval Action Status** drop-down and select *Approved*. The options in the drop-down are:
 - Approved
 - N/A
 - No Further Action Required
 - Rejected
 - Sent Back for Edits
 - Sent to Final Approver
 - Submitted for Approval
6. Click **Save**. The record is saved.
7. Navigate back to the **Approval Request** screen.
8. Click **Approve**. The **Approve Case Agreement** pop-up displays.
9. Click the **Comments** field and enter the required comments.
10. Click **Approve**. The approval request is approved.

Lesson 3: Adoption Petitions and Court Orders

In this lesson, we will see how to generate adoption petitions and update them based on favorable court orders.

Learning Objectives

- Generate and manage adoption petition in C-FIRST!
- Generate adoption court order-related records based on case information

Task 1: Generate Adoption Petition

1. Log in as the Permanency Specialist, and from the homepage, click the **Home** drop-down and select **Cases**. The **Recently Viewed Cases** screen displays.
2. Click the required **Permanency Case ID**. The **Case** screen displays.
3. Click the **Petitions and Motions** hyperlink from the **Related List Quick Links** section. The **Petitions and Motions** screen displays.
4. Click **New** to add a new Adoption petition record. The **New Petition/Motion** pop-up displays.
5. Click the **Adoption Petition** radio button to capture the Adoption Petition details and then click **Next**. The **New Petition/Motion: Adoption Petition** pop-up displays.
6. Click the **Court County** drop-down and select appropriate option.
7. Click the **Court State** drop-down and select the required state.
8. Click the **Docket Number** field and enter the required number.
9. Click the **Notes** field and enter the required notes.
10. Click the **Judge** drop-down and select appropriate option.
11. Click the **Petition/Motion Status** drop-down, select **Completed**. The options in the drop-down are:
 - Abridged
 - Completed
 - Pending
 - Worklisted

Note: Once the Adoption Petition record status is updated to **Completed**, an Adoption Court Order and Hearing record is automatically worklisted. Users can view the associated Court Order and Hearing record by clicking the **Associated Court Orders/Hearings** hyperlink from the **Related List Quick Links** section.

12. Click the **Petition/Motion Date** field and enter the required date.
13. Click the **Court Type** drop-down and select appropriate option.
14. Click **Save**. The Adoption petition record is created. Once Completed, only specific user roles (supervisors, business

admin, etc.) can edit the Adoption Petition. C-FIRST! will also worklist an Adoption Court Order.

Task 2: Generate Adoption Court Order and Adoption Case

The Adoption Court Order and Hearing is Worklisted upon completion of the Adoption Petition. The Permanency Specialist must create the youth's Adoption information record, add the Adoptive Parent(s) as Person(s) Involved prior to adoption finalization. After legally finalizing adoption in court, the worker generates the post-adoptive child/person record.

Let's go ahead and continue to generate a court order for this case.

1. Click the **Court Orders and Hearings** hyperlink from the **Related List Quick Links** section. The **Court Orders and Hearings** screen displays.
2. Click the pending Adoption **Court Order/Hearing ID**. The **Court Order/Hearing** record displays.
3. Click the **pencil** icon on the **Date of Decision** field. The field becomes editable.
4. Click the **Date of Decision** field and enter the required date.
5. Click the **Court Decision** field and enter *Adoption Granted*.
Note: On completion of the Court Order with **Court Decision** as *Adoption Granted*, an Adoption Case is automatically created and linked to the Permanency Case on the Associated Cases related list. On the Adoption Case, the Post Adoptive Person is added as a Case Person.
6. Click the **Date of Hearing** field and enter the required date.
7. Click the **Court Order/Hearing Status** drop-down and select *Completed*. The options in the drop-down are:
 - Abridged
 - Completed
 - Pending
 - Worklisted
8. Click the **Court County** dropdown and select an option.
9. Click the **Judge** dropdown and select an option.
10. Enter the **Adoption/SPG Subsidy Specialist**.
11. Click **Save**. The record is saved.

 Process Tip!

Once the Adopted Youth is sealed by the Post Adoption Team on the Treatment Case, the Permanency Case is restricted. Users may navigate to the **Court Order and Hearing** hyperlink on the Related List Quick Links section of the Permanency Case to validate that the Adoption Court Order and Hearing record of the adopted person is no longer visible on the list view.

Lesson 4: Finalize Case Agreements

In this lesson, we will see how to finalize case agreements and the adoption process for Judy.

Learning Objectives

- Explain the steps required to finalize adoption case agreements
- Create a final adoption case agreement in the system
- Submit and approve the final case agreement

Task 1: Access Adoption Case Agreement

1. Log in as the as an **Adoption/SPG Subsidy Specialist** and from the Home drop-down, click the **Cases** tab. The **Recently Viewed Cases** screen displays.
2. Click the desired **Adoption Case ID**. The case record displays.
3. Click the **Associated Case Agreements** hyperlink from the **Related List Quick Links** section. The **Associated Cases Agreements** screen displays.
4. Click the required Case Agreement record with **Agreement Status** as *Pending*. The record displays.
Note: The fields in the **Finalized Approval** section display when the **Initial Approval Action Status** is updated to *Approved*.
5. Click the **Supervisor** field and enter *Adoption/SPG Subsidy Supervisor*.
6. Click **Save**. The record is saved and the **Case Agreement** screen displays.

Task 2: Submit the Case Agreement

1. Click **Submit for Approval** on the **Case Agreement** screen. The **Submit for Approval** pop-up displays.
2. Click the **Comments** field and enter the required comments.
3. Click **Submit**. The approval request is routed to the Supervisor for approval.

Task 3: Approving the Case Agreement

1. Log in as the **Adoption/SPG Subsidy Supervisor**, and from the homepage, click the **Notifications** icon. A list of notifications displays.
2. Click the *Adoption/SPG Subsidy Specialist is requesting approval for case agreement* notification. The **Approval Request** screen displays.
3. Click the **Related To** hyperlink. The Case Agreement record displays.
4. Scroll down to the **Finalized Approval** section.
5. Click the **Finalized Approval Action Status** drop-down and select *Approved*. The options in the drop-down are:
 - Approved
 - N/A
 - No Further Action Required
 - Rejected
 - Sent Back for Edits
 - Sent to Final Approver
 - Submitted for Approval
6. Click **Save**. The record is saved.
7. Navigate back to the **Approval Request** screen.
8. Click **Approve**. The **Approve Case Agreement** pop-up displays.
9. Click the **Comments** field and enter the required comments.
10. Click **Approve**. The approval request is approved.



System Tip!

Once the Adoption/SPG Subsidy Supervisor provides the necessary approvals to the Case Agreement, the **Case Agreement Status** to *Finalized*.

Lesson 5: SPG Case Agreements

Task 1: Create the SPG Eligibility Review Record

1. Log in as the **Subsidy Specialist**, and from the **Homepage**, click the **Home** drop-down and select **Person**. The **Recently Viewed Person** screen displays.
2. Click *Judy Garcia*. The **Person** screen displays.
3. Click the **Eligibility** hyperlink from the **Related List Quick Links** section. The **Eligibility** screen displays.
4. Click **New** to add a new Guardianship eligibility record. The **New Eligibility** pop-up displays.
5. Click the **Guardianship Eligibility** radio button to capture the eligibility details and then click **Next**. The **New Eligibility: Guardianship Eligibility** pop-up displays.
6. Navigate to the **General Information** section. Click the **Subsidy Review Effective Date** field and enter *a date*.
7. Click the **Assigned Worker** field and select **Permanency Specialist**.
8. Scroll to the bottom of the page and click **Save**. The **Guardianship Eligibility** record screen populates.
9. Click the **Eligibility Status** drop-down, this displays as Pending.
10. Click **Save**. The Eligibility record is saved.
11. In the Subsidy Tab scroll down to the **Medical/Rehabilitative Care Needs** section.
12. Click the **Medical/Rehabilitative Care Needs?** pencil icon, click the drop-down and select Yes.
13. Click the **Medical/Rehabilitative Care Needs Detail** field and enter the required details.
14. Click the **Eligibility Status** drop-down and select *Eligibility*. The options in the drop-down are:
 - Abridged
 - Completed
 - Determined
 - Eligibility
 - Modified
 - Pending
 - Worklisted
15. Click **Save**. The record is saved.

Task 2: Create Agreement Review Record

1. Navigate back to the Adoption Case Agreement.
2. Select the **Case Agreement** hyperlink. The **Case Agreement Details** page displays.
3. Click the **Agreement Review** hyperlink. The **Agreement Review Record** screen displays.
4. Enter the date in the **Date Case Agreement Reviewed** field.
5. Enter *Pending* for **Agreement Review Status**.
6. Enter all Approval Details for the record.
7. Click the **Submit for Approval** button.

Note: This auto-creates a new SPG Case Agreement Record

Task 3: Finalize SPG Case Agreement Record

1. Access the **Case Agreement** record.
2. Enter the case person name in the **Case Person ID** field.
3. Enter the **Rate Type**.
4. Enter the **Rate Schedule**.
5. Enter the **Agreement Status**.
6. Enter the **Agreement Start Date**.
7. Enter the **Agreement End Date**.
8. Review the **Eligibility Information** on the record.
9. Enter the **Provider Information**.
10. Enter the **Initial Approval** information. **Note:** Please follow the process above in the course for approvals.

Knowledge Check!

Question 1: After selecting Adoption Eligibility and clicking Next, which fields typically default?

- A. Eligibility Type = Adoption Eligibility; Eligibility Status = Pending
- B. Eligibility Type = Adoption Eligibility; Eligibility Status = Completed
- C. Eligibility Type = Adoption Eligibility; Eligibility Status = In Progress
- D. Both fields populate after save

Question 2: Once the supervisor approves and the Eligibility Status is updated to Completed, how do you make edits?

- A. Click the pencil icon to edit the record directly
- B. Delete the record and recreate it
- C. Use Correct Eligibility to clone and edit
- D. Change the Assigned Worker

Question 3: Which statement is TRUE about Adoption Petition completion?

- A. Completing the petition prevents any downstream records
- B. Completing the petition worklists an Adoption Court Order/Hearing record
- C. Completing the petition automatically finalizes the Case Agreement
- D. Completing the petition changes Eligibility Status to Completed

Module 6: Relative Caregiver Program (RCP) Eligibility

The Relative Caregiver Program (RCP) provides monthly financial assistance to relatives who are caring for a child under 18 after a court places the child with them due to abuse, neglect, or abandonment. It is an option for relatives to care for a child who cannot remain with their biological parents and needs care outside the parents' home. The program is intended to support relatives who could not otherwise afford the child's day-to-day care by helping cover ongoing costs through a monthly payment.

RCP eligibility is first determined outside of the C-FIRST!.

After completing this module, you will be able to:

- Explain the purpose of Relative Caregiver Program (RCP) eligibility activities in C-FIRST!
- Describe the steps for creating and updating an RCP eligibility record
- Create an RCP eligibility record using the required workflow
- Calculate eligibility results to support case processing
- Apply supervisor override capability to correct eligibility when appropriate
- Explain how rate amounts are reflected on the RCP case agreement
- Track payment history to support record review and case monitoring
- Apply RCP eligibility procedures to complete key case activities

Case Scenario: The Ramirez Family

Let's take a moment to introduce you to **Sofia Ramirez**.

Background

Sofia Ramirez (10 years old) is the daughter of **Elena Ramirez**. Elena is unable to care for Sofia, and Sofia is currently living with her aunt, **Marisol Vega**. Marisol has agreed to be Sofia's caregiver while her family stabilizes and requests Relative Caregiver Program (RCP) support from DCS. Sofia's father, **Daniel Ramirez**, is the Non-Custodial parent (NCP) with limited involvement.

The **RCP Contractor** creates Sofia and the related family members in the system, then the **RCP Supervisor** confirms RCP eligibility outside of C-FIRST!, creates a **Treatment Case**, adds all family members under Case Persons, creates an RCP–Stipend Program record for Sofia, assigns the program to a contractor, and updates the Program Status to Active (triggering system tasks to the assigned worker). The **RCP Worker** then creates a **Relative Caregiver Program Eligibility** record, verifies the pre-populated Client Information, completes the required sections (General Information, Child Information, RCP Information, and RCP Determination), validates that required RCP questions are answered appropriately, and calculates eligibility to confirm Sofia is Eligible for the RCP stipend.

Lesson 1: Determining Eligibility for Relative Caregiver Program

In this lesson, we will determine if Sofia is eligible for the Relative Caregiver Program (RCP).

Learning Objectives

- Create an RCP eligibility record in C-FIRST!
- Calculate eligibility using the required process
- Apply supervisor override capability to correct eligibility when needed
- Describe how rate amounts appear on the RCP case agreement
- Track payment history associated with the case

Task 1: Create RCP Eligibility Record

1. Log in as the **RCP Worker**, and from the **Homepage**, click the **Home** drop-down and select **Person**. The **Recently Viewed Person** screen displays.
2. Click *Sofia Ramirez*. The **Person** screen displays.
3. Click the **Eligibility** hyperlink from the **Related List Quick Links** section. The **Eligibility** screen displays.
4. Click **New** to add a new RCP Eligibility Record. The **New Eligibility** pop-up displays.
5. Click the **Relative Caregiver Program Eligibility** radio button to capture the eligibility details and then click **Next**. The **New**

Eligibility: Relative Caregiver Program Eligibility pop-up displays.

6. Navigate to the **General Information** section of the page.
7. Click the **Eligibility Effective Date** field and enter *4/8/2026*.
8. In the **Eligibility Status** field, select *Pending*.
9. Scroll down to **Child Information** section.
10. Click the **Relative Caregiver** field and enter *Marisol Vega*.
11. Click the **Child Not in State's Custody?** field and enter *Yes*.
12. Click the **Caregiver is 21 Years of Age or Older?** field and enter *Yes*.
13. Click the **Parent Doesn't Reside in Home?** field and enter *Yes*.
14. Scroll down to the **Relative Caregiver Program Information** section.
15. Click the **Awarded Custody by Order?** field and enter *Yes*.
16. Click the **Related to Child?** field and enter *Yes*.

Note: Select *Yes* if the relative caregiver is related to the child through blood, marriage, or adoption within the first, second or third degree of relationship of the parent or stepparent of the child.

17. In the **Relative Resides in County Per Contract** field, select *Yes*.
18. Click the **Cooperating with DHS?** field and enter *Yes*.
Note: Select *Yes* if the relative caregiver agrees to cooperate with any child support proceedings initiated by DHS, including providing information relative to the establishment of paternity if known.
19. Click **Save**. The record is saved and the **Eligibility** screen displays.

Task 2: Calculate Eligibility

1. Click **Calculate Eligibility** from the **Eligibility** screen. The eligibility is calculated.
2. Scroll down to the **Relative Caregiver Determination** section.
3. Review the **Standard Eligibility Determination** field to check if Sofia is RCP Eligible or not.

Task 3: Correct Eligibility with Supervisor Override Capability

If the information entered in the RCP Eligibility Record is incorrect and needs to be fixed, the **RCP Worker** will need to correct and calculate the eligibility again. When something changes, the record needs to be ended, and a second record needs to be created.

Once the RCP Worker starts the process, the **Eligibility Status** of the existing record will be auto updated to *Modified* and will remain noneditable. A clone of the record is created with the **Eligibility Status** as *Pending* for the RCP Worker to make any changes needed. Once the changes are complete and verified, the RCP Worker will calculate eligibility (both initially and for Annual Redeterminations).

1. Log in as the **RCP Supervisor** and from the **Home** drop-down, click the **Cases** tab.
2. Click the required **Treatment Case ID**.
3. Click the **Persons** hyperlink from the **Related List Quick Links** section.
4. Click the required **Case Person ID**.
5. Click the **Person** hyperlink.
6. Click the **Eligibility** hyperlink from the **Related List Quick Links** section.
7. Click **Correct Eligibility** to clone the Record. The new Record displays with the **Eligibility Status** as *Pending*.
8. Scroll down to the **Relative Caregiver Determination** section.
9. Click the **Edit** icon beside the **Override Determination** field. The fields become editable.
10. Click the **Override Determination** drop-down and select the required option. The options in the drop-down are:
 - Eligible
 - No Determination Made
 - Not Eligible

Note: The **Override Reason** field displays once an option is selected from the **Override Determination** drop-down.

11. Click the **Override Reason** drop-down and select the required reason. The options in the drop-down are:
 - Eligibility Determined in Error
 - Other
 - Yearly

12. Click the **Court Order Uploaded?** drop-down and select if a court order supporting the override decision has been uploaded.
13. Click the **Notes** field and enter the details regarding the override decision.
14. Click **Save**. The eligibility decision is corrected and overridden.

Task 4: Understand Rate Amount on the RCP Case Agreement

The rate amount on the RCP Case Agreement is populated from the Rate Maintenance table of the Service Taxonomy record that is linked on the Case Agreement.

Note: When Sofia has a birthday that changes the rate, it will be automatically done by the system and a new agreement is not required.

Payments for finalized RCP Case Agreements are executed monthly to ensure relative caregivers receive timely financial support. The RCP Case Agreement selection criteria is based on the following items:

- Case Status is not Abridged
- Case Agreement Type is Relative Caregiver Program Subsidy
- Case Agreement Status is Finalized

Task 5: Track Payment History

1. Log in as a **Fiscal Worker** and navigate to the **Invoice** tab from the **Homepage**.
2. Review the **Invoice** list view to view and track invoices created through the payment batch process, offering a detailed overview of each invoice record for efficient monitoring.
3. Click the **Invoice** tab drop-down.
4. Navigate to the **Transaction Search** tab.
5. Search the **Transaction Search** screen for records of key activities or financial events within C-FIRST!. These transactions can include case updates, service authorizations, placement changes, payments, and other actions recorded as part of a child's case history.

Knowledge Check!

Question 1: Once the eligibility correction process starts, the existing eligibility record's status is auto updated to Modified and becomes noneditable.

- A. True
- B. False

Question 2: The note for Related to Child? says Yes applies when related through blood, marriage, or adoption within which degree?

- A. First Degree only
- B. First and second degree only
- C. First, second, or third degree
- D. Any degree

Question 3: When Correct Eligibility is used, what happens to enable edits?

- A. Existing record becomes editable immediately
- B. The Supervisor must recreate the Person record
- C. The Case Agreement is automatically finalized
- D. A clone record is created with Eligibility Status = Pending

Question 4: Where is RCP Eligibility determined?

- A. Only in TennCare (MMIS)
- B. Only through a court order screen
- C. Outside C-FIRST!, then entered/processed in C-FIRST!
- D. Inside C-FIRST!

Module 7: Additional Eligibility Information

In this module, we will learn about the other eligibility types.

After completing this module, you will be able to:

- Describe the differences among TennCare, Guardianship, Private Adoption, and SSI eligibility workflows
- Identify the information required to process each eligibility type

Lesson 1: TennCare Eligibility

TennCare Eligibility records in C-FIRST! displays whether a youth qualifies for Medicaid and is determined by the TennCare system using the child's information. The **TennCare** interface shares eligibility information with C-FIRST! and the record is updated.

Task 1: Check TennCare Eligibility

1. Log in as the **Max Specialist**, and from the **Homepage**, click the **Home** drop-down and select **Person**. The **Recently Viewed Person** screen displays.
2. Click the require person record. The **Person** screen displays.
3. Click the **Eligibility** hyperlink from the **Related List Quick Links** section. The **Eligibility** screen displays.
Note: You are able to identify an existing TennCare Eligibility record by viewing the **Eligibility Type** which displays *TennCare Eligibility*. Access the hyperlink and navigate to the details screen.
4. Click **Check TennCare Eligibility** to make a real-time call/request to the TennCare system to confirm eligibility. If an eligibility determination exists, C-FIRST! creates a record for it..

Lesson 2: Guardianship Eligibility

Guardianship Eligibility is the set of requirements a youth and their family must meet to receive guardianship assistance. Under the Guardianship Assistance Program, States, Indian Tribes, and Tribal Organizations that choose to participate can provide guardianship assistance payments to relatives who take legal guardianship of eligible children they previously cared for as foster parents. In practice, an Eligibility Worker, Permanency Specialist, and Subsidy

Specialist Supervisor review the youth's situation and documentation to determine whether the case qualifies for a guardianship subsidy so the guardian can be compensated appropriately. As part of the same determination, they also assess IV-E Eligibility so the agency can use the correct available funding source(s).

Task 1: Creating a Guardianship Eligibility Record

1. Log in as the **Permanency Specialist**, and from the **Homepage**, click the **Home** drop-down and select **Person**. The **Recently Viewed Person** screen displays.
2. Click the required person record. The **Person** screen displays.
3. Click the **Eligibility** hyperlink from the **Related List Quick Links** section. The **Eligibility** screen displays.
4. Click **New** to add a new Guardianship Eligibility record. The **New Eligibility** pop-up displays.
5. Click the **Guardianship Eligibility** radio button to capture the eligibility details and then click **Next**. The **New Eligibility: Guardianship Eligibility** pop-up displays.
6. Click the **Subsidy Review Effective Date** field and enter the required date.
7. Click the **Assigned Worker** field and enter the required worker name.
8. Click the **Approver** field and enter the required approver name.
9. Scroll down to the **Subsidized Permanent Guardianship Criteria** section and answer the following questions in *Yes/No* based on the case information available.
 - In Custody/Guardianship of DCS?
 - Goal of Permanent Guardianship?
 - Demonstrates Strong Attachment?
 - Age 12+ consultation?
 - In the Home for 6 Consecutive Months?
 - Reunification and Adoption Ruled Out?
 - Demonstrates Strong Commitment?
 - Sibling Exiting in the Same FFY?
10. Scroll down to the **Financial Needs Requirements** section and answer the following questions in *Yes/No*.
 - Order With Contrary to the Welfare?
 - IV-E Payments: 6 Consecutive Months?

- Six-month Period?
 - State Payments: 6 Consecutive Months?
 - State Six-Month Period?
 - Voluntary Placement Agreement?
 - IV-E Eligible Sibling, Same FFY?
 - Sibling Name(s)
 - Revenue Max Specialist Validation
11. Click **Save**. The Guardianship Eligibility record is created and displays.
 - Note:** Once saved, a task is generated for the **Max Specialist**
 12. Scroll down to the **Medical / Rehabilitative Care Needs** section.
 13. Click the **pencil** icon. The fields become editable.
 14. Click the **Medical/Rehabilitative Care Needs?** drop-down and select the required option.
 15. Click the **Medical/Rehabilitative Care Needs Detail** field and enter the required details.
 16. Click **Save**. The record is saved.

Task 2: Determining Guardianship Eligibility

1. Log in as the **Max Specialist**, and from the **Homepage**, click the **notifications** icon to navigate to the assigned task. A list of notifications displays.
2. Click the required task. The Eligibility record screen displays.
3. Click the **Eligibility** tab. The sections under the **Eligibility** tab display.
4. Edit the required information by clicking the **pencil** icon. The **Eligibility** tab has the following sections:
 - Financial Needs Requirements
 - Order With Contrary to the Welfare?
 - IV-E Payments: 6 Consecutive Months?
 - Six-month Period?
 - State Payments: 6 Consecutive Months?
 - State Six-Month Period?
 - Voluntary Placement Agreement?
 - IV-E Eligible Sibling, Same FFY?
 - Sibling Name(s)
 - Revenue Max Specialist Validation?
 - Guardianship Determination

- Override Determination
 - Removal Court Order Uploaded?
5. Click **Save** once the edits are made. The record is saved.
 6. Click **Calculate Eligibility**. A message displays that the eligibility is determined.
Note: The **Max Specialists** may use the **Correct Eligibility** button to clone the existing eligibility record and make changes. All information from the original record is carried over to the new clone, with the exception of Standard Eligibility Determination, Eligibility Determination Date, Override Determination, Override Reason, and Notes field, which are blank until the determination rules are run again. Additionally, the **Correct 18 and Over** button is visible to the Subsidy Supervisor if the youth is of and over the age of 18.
 7. Click the **Subsidy** tab.
 8. Click the **pencil** icon next to the **Eligibility Status** field. The field becomes editable.
 9. Click the **Eligibility Status** drop-down and select *Determined*. The options in the drop-down are:
 - Abridged
 - Completed
 - Determined
 - Eligibility
 - Modified
 - Pending
 - Worklisted
 10. Click **Save**. The record is saved and a task is generated for the **Permanency Specialist** for submission for approval.

Task 3: Submitting the record for Approval

1. Login as the **Permanency Specialist** and navigate to the Guardianship Eligibility record. The record displays.
2. Click **Submit for Approval** to send it for approval. The **Submit for Approval** pop-up displays.
3. Click the **Comments** field and enter the required comments.
4. Click **Submit**. The eligibility record is routed to the Supervisor for their approval.

Lesson 3: Private Adoption Eligibility

This process starts with setting up the child and the adoptive parents in C-FIRST!, setting up the adoptive family as a provider, creating an eligibility record, updating the child's special needs information, and determining funding.

Task 1: Creating a Private Adoption Eligibility Record

1. Log in as the **Subsidy Supervisor**, and from the **Homepage**, click the **Home** drop-down and select **Person**. The **Recently Viewed Person** screen displays.
2. Click the required person record. The **Person** screen displays.
3. Click the **Eligibility** hyperlink from the **Related List Quick Links** section. The **Eligibility** screen displays.
4. Click **New** to add a new Adoption eligibility record. The **New Eligibility** pop-up displays.
5. Click the **Private Adoption Eligibility** radio button to capture the eligibility details and then click **Next**. The **New Eligibility: Private Adoption Eligibility** pop-up displays.
6. Navigate to the **General Information** section. Click the **Subsidy Review Effective Date** field and enter *a date*.
7. Click the **Legally Free for Adoption?** drop-down and select *Yes*.
8. Click the **Assigned Worker** field and select **Permanency Specialist**.
9. Scroll to the bottom of the page and click **Save**. The **Adoption Eligibility** record screen populates.
10. Click the **Eligibility Status** drop-down, this displays as Pending.
11. Click **Save**. The Eligibility record is saved.
12. In the **Subsidy** tab, scroll down to the **Special Needs** section. Click the **pencil** icon. This section has the following fields. Please select *Yes/No* for the below.
 - Disability Which Substantially Limits?
 - Behavioral/Emotional Disorder?
 - Minority Race/Ethnicity, Age 2+?
 - Sibling Group?
 - Severe Abuse?
 - Deferred: Genetic/Medical History?
 - Deferred: 3+ Disrupted Placements?
 - Deferred: Neonatal Abstinence Syndrome?

- Intellectually Disabled?
 - Moderate-Severe Condition with Treatment
 - Caucasian, Age 9+?
 - 3+ Consecutive Years in DCS Custody?
 - SSI Medical/Disability Requirement?
 - Deferred: Prenatal Exposure to Toxins?
 - Deferred: Safe Haven?
13. Scroll down to the **Provider Questions** section. This section has the following fields. Please select *Yes/No* for the below.
- Approved Preliminary/Updated Home Study?
 - Criminal Records Check Cleared?
 - TBI/FBI Fingerprint Check Cleared?
 - National Sexual Offender Registry?
 - TN Dept of Health Abuse Registry?
 - DCS Records Check Cleared?
 - Adoptive Parent Resided Another State?
 - Date of Preliminary/Updated Home Study
 - Date of Recent Criminal Records Check
 - Date of Recent TBI/FBI Fingerprint Check
 - Date National Sexual Offender Registry
 - Date TN Dept of Health Abuse Registry
 - Date of Most Recent DCS Records check
 - If Yes, Check and Clearance Obtained?
14. Scroll down to the **Reasonable Efforts** section. This section has the following fields. Please select *Yes/No* for the below.
- Foster Parent Adoption?
 - Required Recruitment Efforts?
 - Identified Pre-Adoptive Families?
 - Relative Adoption?
15. Scroll down to the **Medical/Rehabilitative Care Needs** section. This section has the following fields. Please select *Yes/No* for the below.
- Medical/Rehabilitative Care Needs?
 - Medical/Rehabilitative Care Needs Detail
16. Scroll up and click the **Eligibility Status** drop-down and select *Eligibility*. The options in the drop-down are:
- Abridged
 - Completed
 - Determined

- Eligibility
 - Modified
 - Pending
 - Worklisted
17. Click **Save**. The record is saved and a task is triggered for the **Max Specialist** to complete the eligibility record.

Task 2: Determining Private Adoption Eligibility

1. Log in as the **Max Specialist**, and from the **homepage**, click the **Notifications** icon. A list of notifications displays.
2. Click the **Adoption Eligibility Pending Eligibility Determination** notification. The Eligibility record screen displays.
3. Click the **Eligibility** tab. Navigate to the **Fostering Connections** section.
4. Click the **pencil** icon and respond with Yes/No. This section has the following fields:
 - Legal Status?
 - Child of a Minor Parent?
 - Meets SSI Medical or Disability?
 - Prior Eligibility for Adoption Assist?
5. Scroll down to the **Standard Eligibility** section. This section has the following fields:
 - Prior Receipt of Adoption Assistance?
 - SSI Medical and Financial Requirements
 - Meets July 16, 1996, AFDC Requirements?
 - Child of Minor IV-E Parent
6. Scroll down to the **Private Adoption Determination** section. Please select Yes/No for the fields in this section. The section has the following fields:
 - Fostering Connections Eligible?
 - Standard Eligibility Determination
 - Eligibility Determination Date
 - Removal Court Order Uploaded?
 - Override Determination
 - Override Reason
 - Notes
7. Click **Save**. The record is saved.

8. Scroll up and click **Calculate Eligibility**. A message displays that eligibility has been calculated successfully and the result is displayed in the **Fostering Connections Eligible?** and **Standard Eligibility Determination** field.
9. Click the **Subsidy** tab. The **General Information** section displays.
10. Click the **pencil** icon next to the **Eligibility Status** field. The fields become editable.
11. Click the **Eligibility Status** drop-down and select *Determined*.
12. Click **Save**. The record is saved and a task is generated for the **Subsidy Supervisor** to submit the record for approval.



Process Tip!

Max Specialists need to continue to follow policy guidelines regarding verifications and documents that need to be uploaded into the system for eligibility purposes. All documentation that is used to determine eligibility or any SSI verification will still need to be uploaded.

Task 3: Submit the Eligibility Record

1. Log in as the **Subsidy Supervisor** and navigate to the Private Adoption Eligibility record. The record displays.
2. Click the **pencil** icon next to the **Approver** field. The field becomes editable.
3. Click the **Approver** field and enter the required approver name.
4. Click **Save**. The record is saved.
5. Click **Submit for Approval**. The **Submit for Approval** pop-up displays.
6. Click **Submit**. The eligibility record is routed to the Supervisor for their approval.

Note: Once eligibility is calculated and approved (by the **Subsidy Supervisor's Supervisor**), a **Case Agreement** is created and approved, the subsidy effective date is recorded, and the process ends.

Lesson 4: Social Security Income Eligibility

The process starts with the **Max Specialist** applying to the Social Security Administration (SSA) to determine if children with disabilities from families with limited income are eligible for Supplemental Security Income (SSI). SSA then determines SSI Eligibility (outside of C-FIRST!) with details like **Payee End Date** and **Funding End Date**. If the eligibility is approved, the **Max Specialist** receives SSI payment information through the Treasury interface. Max Specialists are then able to create SSI Eligibility records in C-FIRST!.

Task 1: Creating a Private Adoption Eligibility Record

1. Log in as the **Max Specialist**, and from the **Homepage**, click the **Home** drop-down and select **Person**. The **Recently Viewed Person** screen displays.
2. Click the required person record. The **Person** screen displays.
3. Click the **Eligibility** hyperlink from the **Related List Quick Links** section. The **Eligibility** screen displays.
4. Click **New** to add a new SSI Eligibility record. The **New Eligibility** pop-up displays.
5. Click the **SSI Eligibility** radio button to capture the eligibility details and then click **Next**. The **New Eligibility: SSI Eligibility** pop-up displays.
6. Navigate to the **SSI Eligibility Information** section.
7. Click the **Standard Eligibility Determination** field and enter *SSI Eligible*.
8. Click the **Eligibility Determination Date** field and enter the required details.
9. Click the **Payee End Date** and **Funding End Date** fields and enter the required dates.
10. Click the **Assigned Worker** field and enter the required worker's name.
11. Click **Save**. The SSI Eligibility record is created.

Once the record is saved, the SSI Eligibility Details (the actual record), provides you with the **Details** tab. The **Details** tab includes the following: *SSI Eligibility Information* and *Navigation Links*.

Next, the **Client Benefits Account** needs to be set up and manage the benefit in the system.

Note: SSI Eligibility sections also need to be completed when a child is receiving SSI when they enter into DCS custody. Please continue to follow your policy guidelines on processing SS Eligibility for children.

Knowledge Check!

Question 1: Which statement is TRUE regarding TennCare Eligibility?

- A. Information is manually entered by staff in C-FIRST!
- B. Information is created/updated via the TennCare interface from MMIS
- C. Information is copied from case notes
- D. Information is only entered by supervisors

Question 2: *True or False:* The Adoption Eligibility record provides you with the Subsidy, Eligibility, and Attachments tabs.

- A. True
- B. False

Question 3: Which field do you need to enter on the SSI Eligibility pop-up page?

- A. Not Eligible
- B. Income
- C. Funding End Date
- D. Social

Module 8: Reviewing Reimbursability Information

This module discusses reviewing reimbursability information.

After completing this module, you will be able to:

- Describe how to access and view reimbursability

Lesson 1: Tracking Reimbursability

IV-E Reimbursability Tracking records in C-FIRST! allow staff to view which children are eligible for federal reimbursement, maintaining compliance. These records are auto populated against person records using eligibility and case information. Eligibility staff can access person records to view this information.

Learning Objectives

- Review reimbursability information
- Access and view reimbursability history

Let's view this information for Jordan.

Task 1: Review Reimbursability Details

1. Log in as the **Max Specialist**, and from the **Homepage**, click the **Home** drop-down and select **Person**. The **Recently Viewed Person** screen displays.
2. Click *Jordan Dean*. The **Person** screen displays.
3. Click the **IV-E Reimbursability Tracking** hyperlink from the **Related List Quick Links** section. The **IV-E Reimbursability Tracking** screen displays along with the following record information:
 - IV-E Reimbursability Tracking Name
 - Person ID
 - Funding Category
 - IV-E Reimbursable
 - Custody Date
 - Custody End Date
 - Status
 - Effective Date
 - End Date

4. Click the **IV-E Reimbursability Tracking Name** hyperlink. The IV-E Reimbursability Details screen displays. This screen provides the following:

- Child Information
 - IV-E Reimbursability Tracking Name
 - Person
 - SSN
 - Gender
 - Funding Category
 - Person ID
 - Date of Birth
 - Age
 - City, State, Zip
 - Original Record ID
- General Information
 - Reimbursability Type
 - IV-E Reimbursable
 - Effective Date
 - End Date
 - Status
 - Custody Date
 - Custody End Date
 - Subsidy Review Effective Date
- Child Placement
 - Placement
 - Placement Type
 - Placement Service Type
 - Child Placed in a Reimbursable Setting?
 - Provider
 - Licensed /Certified Provider
 - Placement Begin Date
 - Placement End Date
 - Service
- Child's Need
 - Did the Child Receive SSI?
- Reasonable Efforts
 - Reasonable Efforts Done Timely/Not Due
 - Latest Hearing Date
 - Reasonable Efforts Date

- Eligibility
 - Eligibility
 - Eligibility End Date
 - Eligibility Type
- Navigation Links
 - Court Order ID
 - Case ID

Task 2: View Tracking Reimbursability History

1. Click the **IV-E Reimbursability Tracking History** hyperlink from the **Related List Quick Links** section. The **IV-E Reimbursability Tracking History** screen displays along with the following information:
 - Date
 - Field
 - User
 - Original Value
 - New Value

Knowledge Check!

Question 1: *True or False:* Reimbursability records are accessible to you from the Person Details screen.

- A. True
- B. False

Module 9: Supervisor Functions Overview

In this module, we will discuss Eligibility reports.

After completing this module, you will be able to:

- Describe how to access reports and list some reports that will be available to you

Lesson 1: Reports Overview

Certain staff, based on security access, have access to reports that provide information related to eligibility information. 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 Eligibility reports that are available to you

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

Task 1: Eligibility Report

This report provides a summary of all cases that are pending IV-E eligibility determination.

Task 2: IV-E Rates Report

This report provides a summary of IV-E Funding Rates for Foster Care, Residential, Bright Futures, Adoption Assistance, and Subsidized Permanent Guardianship (SPG) services. This report tracks percentages and amounts across a region and county. It allows workers to view funding at a transactional level and helps with monitoring federal and state compliance.

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:

1. Navigation links to access the Home Page, 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 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.
 - The **Home Screen** icon helps navigate to the **Home** page.
 - 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.

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** dropdown 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.

The screenshot shows the 'Intake Report' interface. On the left, under 'GLOBAL FILTERS', the 'Region' dropdown is set to 'Midwest Region'. The main table displays data for this region. A red box highlights the 'Region' filter dropdown and the corresponding data rows in the table.

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	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

- 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.

The screenshot shows the 'Intake Report' interface. The 'Region' filter is still set to 'Midwest Region'. The 'County' dropdown is now set to 'Anderson'. The main table displays data for this specific region and county. A red box highlights the 'County' filter dropdown and the corresponding data rows in the table.

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	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

- 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.

- 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.

Knowledge Check!

Question 1: *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.
CCWIS	This refers to the project, Comprehensive Child Welfare Information System, which is working towards delivering a modernized child welfare system.
Carat	This is a small downward facing symbol icon that is used in C-FIRST! to indicate an expansion or a drop-down.
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.
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.
Widget	A small part of an app, like a button, search box that you can see or get information.
Check TennCare Eligibility	A button that enables users to check Medicaid eligibility.

Term	Definition
Calculate Eligibility	A button that enables users to calculate the eligibility of a certain child using the information entered in an eligibility record.
Correct Eligibility	A button that enables users to edit the eligibility record once the eligibility is determined. This is mainly helpful when eligibility needs to be reassessed based on certain changes in parameters.
CANS	The Child and Adolescent Needs and Strengths assessment (CANS) is a structured decision-support tool used in child welfare to evaluate a child's needs, risks, functioning, and strengths.
FAST	Family Advocacy and Support Tool (FAST) is a widely used assessment tool in child welfare, designed to evaluate the needs and strengths of families at risk of involvement with child welfare services.
FCIP	The Family Crisis Intervention program (FCIP) is a non-custodial program for youth with unruly behaviors which require in-home services.
FFPSA	The Family First Prevention Services Act (FFPSA) aims to transform child welfare by providing federal funding for prevention services to keep families together and reduce the need for foster care placements. Note: QRTP Eligibility is a subset of FFPSA policy. In C-FIRST!, the QRTP eligibility record is equivalent to a Custodial - FFPSA eligibility record.
NPI	This refers to National Provider Identification, which is unique 10 -digit identification number assigned to Provider Organizations.

Term	Definition
SSI	Supplemental Security Income (SSI) plays a crucial role in child welfare by providing financial support to children who are blind or disabled.
IV-E Eligibility	Title IV-E eligibility determines which children in foster care, adoption, or guardianship qualify for federal funding based on financial, judicial, and placement criteria.