



C-FIRST! Training

Foster Home Entry and
Management
Learner Guide

Tennessee Department of Children's Services



Foster Home Entry and Management Course

Learner Agenda

Day 1

Course Introduction

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

Module 1: General Navigation

Lesson	Task
Lesson 1: Logging into C-FIRST! and Understanding Roles	• Task 1: Log in to C-FIRST! • Task 2: Understand User Role Permissions
Lesson 2: Navigating the Homepage	• Task 1: Navigate to the Homepage • Task 2: Access Provider Records from Homepage Components
Lesson 3: Document Management	• Task 1: Document Management Overview • Task 2: Upload and Download Documents

Module 2: Person Management

Lesson	Task
Lesson 1: Searching for a Person	- Task 1: Access Person Search - Task 2: Search for an Existing Person Using Name and Date of Birth - Task 3: Search for a Child Using Limited Information - Task 4: Perform a Search That Returns No Results
Lesson 2: Creating New Person Records	- Task 1: Initiate New Person Record Creation - Task 2: Generate a Person ID (PID)

Module 3: Provider Inquiry Management

Lesson	Task
Lesson 1: Review and Manage the Inquiries from the Potential Providers	Task 1: Review Provider Inquiry and Update the Status

Morning Break 10:30 – 10:45 AM

Module 4: Application Management

Lesson	Task
Lesson 1: Foster Family Application	- Task 1: Create the Foster Family Application - Task 2: Complete the Household Details

Lunch 12:00 – 1:00 PM

Module 5: Provider Setup

Lesson	Task
Lesson 1: Create Provider Record and Associate Provider	- Task 1: Create a New Provider Record - Task 2: Complete Child Preferences and Provider Details - Task 3: Add Provider Address - Task 4: Associate and Create New Provider Persons
Lesson 2: Review Provider Criminal History & Training and Waiver Information	- Task 1: Review of Criminal History - Task 2: Review Training Information - Task 3: Review Provider Waiver Information

Module 6: Provider Type Management

Lesson	Task
Lesson 1: Create Provider Type	Task 1: Create a Foster Family Provider Type
Lesson 2: Home Visit & Study	- Task 1: Create a New Home Visit - Task 2: Home Study - Task 3: Complete Application Disposition

Afternoon Break 2:45 – 3:00pm

Module 7: Agreement Management

Lesson	Task
Lesson 1: Agreement Services	- Task 1: Create New Foster Family Agreement - Task 2: Create an Agreement Service - Task 3: View Agreement Record & History List View - Task 4: Review Master Service Rates - Task 5: RET Checklist - Task 6: Manage Provider Type Status

Wrap-Up Day 1 3:45 – 4:00 PM

Day 2

Module 8: Provider Management Actions

Lesson	Task
Lesson 1: Provider Management Action Related List	- Task 1: Initiate or View the Provider Management Adverse Action - Task 2: Close Provider

Module 9: Associated Related List

Lesson	Task
Lesson 1: Provider Related List Overview	- Task 1: View Associated Cases Related List - Task 2: View Intake Related List - Task 3: Creating Corrective Action Plans - Task 4: Create Provider Appeals

Morning Break 10:30 – 10:45 AM

Module 10: Provider Portal

Lesson	Task
Lesson 1: Portal Enrollment and Account Setup	- Task 1: Requesting Access to the Provider Portal - Task 2: Setting up and Activating a User Account
Lesson 2: Homepage and Profile Navigation	- Task 1: Navigating the Homepage - Task 2: Viewing Profile Information
Lesson 3: Managing Tasks and Submissions	- Task 1: Viewing and Tracking Assigned Tasks - Task 2: Submitting a Support Request

Lesson	Task
Lesson 4: Invoices, Payments and Services	- Task 1: Viewing Invoices and Payment Details - Task 2: Review Services - Task 3: Viewing Licenses and related information
Lesson 5: Applications and Placements	- Task 1: Submitting Applications through the Portal - Task 2: Viewing Placements and Placement Referrals
Lesson 6: Reviewing and Accessing Placed Child Information	- Task 1: Viewing Child Health and Medication Details - Task 2: Reviewing Allergies, Diagnoses and Insurance Information - Task 3: Accessing Education Details and Appointment Information

Module 11: Supervisor Functions

Lesson	Task
Lesson 1: Approve Key Foster Family Application Components	- Task 1: Manage Team Workloads - Task 2: Approve an Item from the Items to Approve Widget - Task 3: Reassign Record to Another User
Lesson 2: Access Tableau	- Task 1: Accessing Tableau Reports - Task 2: Filtering a Report - Task 3: Downloading a Report

Wrap-Up Day 2 12:00 – 12:15 PM

Table of Contents

Introduction	5
Let's Dive In	5
Case Scenario: The Geller Family	6
What to Expect	6
Your Role	6
Course Objectives	6
Icons Used Throughout the Course	7
Module 1: General Navigation.....	7
Lesson 1: Logging in to C-FIRST! and Understanding Roles.....	8
Task 1: Log in to C-FIRST!	8
Task 2: Understand User Role Permissions	8
Lesson 2: Navigating the Homepage.....	9
Task 1: Navigate to the Homepage.....	9
Task 2: Access Provider Records from Homepage Components	10
Lesson 3: Document Management	11
Task 1: Document Management Overview	11
Task 2: Upload and Download Documents	12
Knowledge Check!.....	13
Module 2: Person Management.....	15
Lesson 1: Searching for Existing Person Records.....	15
Task 1: Access Person Search.....	15
Task 2: Search for an Existing Person Using Name and Date of Birth.....	16
Task 3: Search for a Child Using Limited Information.....	17
Task 4: Perform a Search That Returns No Results.....	17
Lesson 2: Creating New Person Records	18
Task 1: Initiate New Person Record Creation	18
Task 2: Generate a Person ID (PID).....	19
Knowledge Check!.....	20

Module 3: Provider Inquiry Management	21
Lesson 1: Review and Manage the Inquiries from the Potential Providers	21
Task 1: Review Provider Inquiry and Update the Status.....	21
Knowledge Check!.....	23
Module 4: Application Management.....	24
Lesson 1: Foster Family Application	24
Task 1: Create the Foster Family Application	24
Task 2: Complete the Household Details.....	30
Knowledge Check!.....	33
Module 5: Provider Setup	34
Lesson 1: Create Provider Record and Associate Provider.....	34
Task 1: Create a New Provider Record.....	35
Task 2: Complete Child Preferences and Provider Details	37
Task 3: Add Provider Address.....	40
Task 4: Associate and Create New Provider Persons.....	41
Lesson 2: Review Provider Criminal History & Training and Waiver Information	44
Task 1: Review of Criminal History	44
Task 2: Review Training Information	46
Task 3: Review Provider Waiver Information	47
Knowledge Check!.....	49
Module 6: Provider Type Management.....	50
Lesson 1: Create Provider Type	50
Task 1: Create a Foster Family Provider Type	50
Lesson 2: Home Visit & Study.....	51
Task 1: Create a New Home Visit	52
Task 2: Home Study	53
Task 3: Complete Application Disposition	56
Knowledge Check!.....	58
Module 7: Agreement Management.....	58
Lesson 1: Agreement Services.....	59

Task 1: Create New Foster Family Agreement	59
Task 2: Create an Agreement Service.....	61
Task 3: View Agreement Record & History List View.....	62
Task 4: Review Master Service Rates	64
Task 5: RET Checklist.....	65
Task 6: Manage Provider Type Status	67
Knowledge Check!.....	68
Module 8: Provider Management Actions.....	68
Lesson 1: Provider Management Action Related List	69
Task 1: Initiate or View the Provider Management Adverse Action	69
Task 2: Close Provider	71
Knowledge Check!.....	72
Module 9: Associated Related List	74
Lesson 1: Provider Related List Overview.....	74
Task 1: View Associated Cases Related List	75
Task 2: View Intake Related List	76
Task 3: Creating Corrective Action Plans	76
Task 4: Create Provider Appeals	77
Knowledge Check!.....	78
Module 10: Provider Portal.....	80
Lesson 1: Portal Enrollment and Account Setup	81
Task 1: Requesting Access to the Provider Portal.....	81
Task 2: Setting up and Activating a User Account	81
Lesson 2: Homepage and Profile Navigation.....	82
Task 1: Navigating the Homepage	83
Task 2: Viewing Profile Information.....	83
Lesson 3: Managing Tasks and Submissions	85
Task 1: Viewing and Tracking Assigned Tasks.....	85
Task 2: Submitting a Support Request.....	86
Lesson 4: Invoices, Payments and Services.....	87
Task 1: Viewing Invoices and Payment Details.....	87
Task 2: Review Services	88

Task 3: Viewing Licenses and related information	89
Lesson 5: Applications and Placements.....	89
Task 1: Submitting Applications through the Portal.....	89
Task 2: Viewing Placements and Placement Referrals.....	91
Lesson 6: Reviewing and Accessing Placed Child Information	93
Task 1: Viewing Child Health and Medication details.....	94
Task 2: Reviewing Allergies, Diagnoses and Insurance Information.....	94
Task 3: Accessing Education Details and Appointment Information	95
Knowledge Check!.....	97
Module 11: Supervisor Functions	98
Lesson 1: Approve Key Foster Family Application Components	98
Task 1: Manage Team Workloads	99
Task 2: Approve an Item from the Items to Approve Widget	99
Task 3: Reassign Record to Another User.....	100
Lesson 2: Access Tableau.....	100
Task 1: Accessing Tableau Reports.....	101
Task 2: Filtering a Report.....	102
Task 3: Downloading a Report	104
Knowledge Check!.....	104
Glossary.....	106

Introduction

Welcome to the State of Tennessee Department of Children's Services (DCS) C-FIRST! **Foster Home Entry Management Course**. We are excited to have you here with us! C-FIRST! provides comprehensive and streamlined ways to manage intakes, Investigations, Safety Decisions, Case and Person Data, Placement, Provider, and Eligibility Information.

This course provides practical end-to-end learnings related to Foster Home entry for DCS Foster Care Support Staff including Provider Inquiry, Document Management, Foster Home Applications, Setting Up Providers, Processing Agreements, Accessing the Provider Portal, Invoicing and Payments, and Supervisory Functions.

Let's Dive In

This learner guide will help you build confidence using C-FIRST! for Provider and Placement Management work. You will learn how Foster Care Specialists in the DCS staff group use C-FIRST! in their day-to-day work, and how prospective foster parents as potential providers use the Provider Portal to submit inquiries, complete applications, update information, and track activity.

Throughout the modules, you will learn how to navigate the system, use key features efficiently, and complete important tasks that support provider and placement-related work. This includes managing documents, reviewing and following up on provider inquiries, creating and updating applications, maintaining provider records, and managing provider authorizations. You will also learn how to work with visits, home studies, agreements, and related lists so you can better understand how information is connected across the system.

In addition, you will become more familiar with the Provider Portal, including what portal users can see and do, how staff may use portal information to support casework, and how that information connects to your role. Supervisor-specific modules also introduce functions such as approvals, workload management and reporting to help support consistent and effective work across teams.

Finally, you will learn the supervisor-specific functions that help teams stay aligned and productive. This includes managing workloads, handling approvals. This section also includes steps on accessing, running, and filtering reports which can be accessed by all users to quickly find the insights needed to guide decisions and support consistent outcomes.

Case Scenario: The Geller Family

A prospective Foster Family, the Geller Family, submitted an inquiry through the Provider Portal expressing interest in becoming an approved Foster Home. As their application moves forward, you as the DCS Staff member will support the end-to-end process: reviewing the inquiry, collecting and managing required documentation, creating the Provider record, completing reviews and visits, and preparing the Provider to receive placements. Along the way, you will also see how portal activity (tasks, changes, incident reports, invoices, and placement details) connects to the work completed in C-FIRST!.

What to Expect

Throughout this guide, you will follow the Geller family's journey from first contact to active Provider status.

Your Role

In this training, you will learn how DCS staff support Foster Home Management work in C-FIRST!. You will build skills in completing key processes, reviewing information submitted by prospective foster parents and foster families through the Provider Portal, and tracking updates across the system. You will also learn how portal activity connects to staff work so you can better understand the process. In addition, you will be introduced to the supervisor role and the oversight activities that support consistent work across teams, including approvals and reporting.

Course Objectives

By the end of this training, you will be able to navigate the C-FIRST! homepage and use key features to complete essential daily tasks related to foster home support. You will learn how to manage foster home work across the full process, including initial inquiries, foster parent applications, foster home records, and authorization activities.

You will also build skills in maintaining clear documentation and understanding how information is connected across foster home agreements and related records. In addition, you will learn how activity in the Foster Parent portal connects to internal staff workflows and supports timely follow-up and decision-making for prospective and current foster homes. Where applicable, you will also become familiar with supervisor activities such as approvals and reporting.

Icons Used Throughout the Course

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

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

Module 1: General Navigation

The module covers the C-FIRST! search functionality for locating Providers and Applications, switching between list views, and managing the alerts and notifications that drive daily workflow. Users will practice accessing task notifications, switching between task views such as **Today's Tasks**, **My Tasks**, **All Overdue**, **Completed Within Last 7 Days** and, **Delegated Tasks**, navigating from a task to its related Record, and marking tasks as complete. The module concludes with personalizing the user experience by pinning default list views and adjusting list view settings.

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

- Log in to C-FIRST! and identify Homepage components and user role permissions

- Navigate between tabs, Providers, and records using the global menu and **Related List Quick Links**
- Access, filter, and manage task notifications across different task views
- Navigate from a task notification to its related Provider Record

Lesson 1: Logging in to C-FIRST! and Understanding Roles

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

Learning Objectives

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

Task 1: Log in to C-FIRST!

You have been assigned to the Geller family case. Follow the steps below to log in to C-FIRST! with the correct credentials and proceed with the case:

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

Task 2: Understand User Role Permissions

Your specific role determines what actions you can perform in C-FIRST!. Understanding these permissions helps you know when you can complete tasks independently and when you must submit work for supervisory approval. Note that as a Foster Care Support Staff, you can view the **Today's Tasks** component on your **Homepage**. C-FIRST! displays tasks assigned to you with due dates matching today's date.

1. Click **View All**, to view the **Today's Task** list view. The default view is the Recently Viewed tasks. The fields displayed are **Subject, Name, Related To, Due Date**, and **Assigned Alias**.
2. Click the **Subject** hyperlink to open **Task Details** screen or the **Related To** hyperlink opens the application the task is associated to.



System Tip!

There are three list views visible in the system: All Providers, My Providers and Recently Viewed. The default is set to display your Recently Viewed providers. You can pin other list views to be your default. When you select My Providers in the List View dropdown, the system will display all Providers in the system to which you are the Assigned Worker or Assigned Supervisor, including details such as Account Name, Region, Provider Type Statuses, Agreement Services, Provider Persons, Website, and Assigned Supervisor. When you select All Providers in the dropdown, the system will display all the Providers in the system.

Lesson 2: Navigating the Homepage

Efficient navigation in **C-FIRST!** enables **Foster Care Support staff** to quickly access the Geller family case and related records. Understanding the global menu structure and Homepage components will allow timely location of critical information needed to complete the Provider search.

Learning Objectives

- Navigate between tabs using the global menu
- Access Provider Records from **Homepage** components

Task 1: Navigate to the Homepage

In this task, you will log in to C-FIRST!, explore the main dashboard homepage, and practice navigating through the key sections available to Providers. Review the features and layout specific to your Provider tasks. The following steps will help you become familiar with the features and layout of this module:

1. Navigate to the **Homepage**.

Note: The **Homepage** displays tools for workers to track their progress. The Dashboard view will default to feature sections specific to your role.

2. Review the **Today's Tasks** section that displays the following widgets:
 - **Today's Tasks:** This section displays the tasks that are scheduled for the current day.
 - **View All Link:** This link allows users to view all the tasks.
 - **Today:** This list view displays tasks that are due today.
 - **My Tasks:** This list view displays tasks that are assigned to the user.
 - **All Overdue:** This list view lists tasks that have not been completed by their due date.
 - **Completed Within Last 7 Days:** This list view displays recently completed tasks, those that were completed in the past 7 days.
 - **Previous Login Information:** This section displays the date and time of your previous login.

Task 2: Access Provider Records from Homepage Components

Your **Homepage** displays several components that provide direct access to your assigned tasks. The Geller family case should be displayed in C-FIRST! in your notifications since it was assigned to you. To locate the Provider, follow the steps below:

1. Locate the navigation bar at the top of the C-FIRST! screen. The navigation bar displays tabs for major system functions.
2. Click the **Home** tab in the navigation bar. C-FIRST! displays your **Homepage**.
3. Navigate to the **Provider** tab from the home dropdown. The **Provider Recently Viewed** screen displays.
4. Locate the Provider and click the Account Name hyperlink to view the details. The **Details** screen of the Provider record is displayed.
5. Observe that the **Providers List View** displays columns including:
 - Account Name
 - Region
 - Provider Types

- Provider Type Status
- Agreement Services
- Provider Persons
- Website
- Assigned Supervisor



System Tip!

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

Lesson 3: Document Management

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

Learning Objectives

- Overview of Document Management
- Upload or download documents

Task 1: Document Management Overview

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

1. Log in as **Foster Care Support Staff** and navigate to the **Provider** tab from the home dropdown. The **Provider Recently Viewed** screen displays.
2. Click the desired hyperlink on the Provider **Account Name** to navigate to the record. The **Provider** screen displays.
3. Click the **Attachments** tab. This displays the list of all files or documents associated with the corresponding record.
4. Click the desired **File Name** hyperlink to open the file and view.



System Tip!

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

Task 2: Upload and Download Documents

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

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

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

**System Tip!**

You can browse files to upload or drag and drop files. Once you have selected the necessary documents, they will display down on the left-hand side of the ImageTrust screen.

ImageTrust provides users with a wide variety of functions to split, combine, duplicate individual documents and pages from those documents before uploading. Once you have finished editing, splitting, and merging the chosen documents, you can then choose each individual document and complete the necessary document information. File names are automatically assigned by the system. After files have been uploaded, they can no longer be edited. **Note:** In C-FIRST! you will not be allowed to delete information.

**Process Tip!**

When you click on the Download button, documents are immediately downloaded to your computer unless you select documents totaling more than 100 MB. If files are too large, C-FIRST! creates a zip file for you to download.

Knowledge Check!

Question 1: What are the things that may vary based on your user role and permissions?

- A. Tabs and Views
- B. Field Descriptions
- C. Section Descriptions
- D. Tabs and Global Search

Question 2: What is the key purpose of Document Management in C-FIRST?

- A. Automatically approving Licenses
- B. Calculating payment rates without agreements
- C. Running placement matching without provider data

D. Uploading, managing and downloading documents

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.

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

Lesson 1: Searching for Existing Person Records

Before adding any individuals, 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.

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

1. Log in to C-FIRST! using your credentials. C-FIRST! displays the **Homepage**.
2. Navigate to the **Person Search** tab from the **Home** dropdown.
3. Click the **Name** field and enter details.
4. Click the **Search** button. C-FIRST! opens the **Person Search** 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

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.

**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

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 **Select** button 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

Monica has no prior DCS history in Tennessee. You will search for Monica 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. 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!.

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

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** field and enter *date of birth*.
5. Click the **Gender at Birth** dropdown and select *gender*.
6. Click the **Race** dropdown 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
7. Click the **Ethnicity** dropdown and select *ethnicity*. Options include:
 - Hispanic or Latino
 - Not Hispanic or Latino
 - Unable to Determine
8. Complete any additional required fields displayed on the screen.
9. 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 Monica, 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.

3. Click **Confirm** to generate the PID. C-FIRST! assigns a unique Person ID and displays it in the **Person ID** field.
4. 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.

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

Module 3: Provider Inquiry Management

This module introduces the end-to-end process for managing Provider Inquiries in the system as a DCS staff user. You will learn how to receive and review inquiry details, confirm that the information is complete, and determine whether the inquiry is ready for screening. You will also practice reviewing submitted materials, documenting findings, and updating the inquiry status so information is clear and current throughout the process.

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

- Review and manage the inquiries received from potential Providers

Lesson 1: Review and Manage the Inquiries from the Potential Providers

This lesson covers the first steps in the Geller Family scenario, beginning when the Geller family submits a Provider Inquiry through the Provider Portal and the agency starts assessing their interest in becoming an approved foster home. You will learn how to access the Provider Inquiry and review the submitted information so the application can move forward without delays or missed requirements.

Learning Objectives:

- Locate and view a Provider Inquiry submitted through the Provider Portal
- Review and validate inquiry details for completeness and accuracy

Task 1: Review Provider Inquiry and Update the Status

After an inquiry is submitted through the Portal, to review the Inquiry details in C-FIRST! follow the steps below:

1. Log in as the Foster Care Support Staff, the **Homepage** screen displays.
2. Navigate to the **Provider Inquiry** tab from the **Home** dropdown. The **Provider Inquiry** list view screen displays the following fields:
 - Provider Inquiry ID
 - First Name

- Last Name
 - Source
 - Provider Organization Name
 - Status
 - Created Date
3. Click the relevant **Provider Inquiry ID** hyperlink on the **Provider Inquiry** list view. The **Details** screen is displayed.
 4. Review the **Information** section, some of the fields would be already populated with the details about the Provider from the Provider Portal. Below are the fields that are displayed:
 - **Provider Inquiry ID** – This displays the unique Inquiry ID details.
 - **Status** – This displays the status of the Provider Inquiry.
Note: The **Status** field can be edited.
 - **Source** – This displays the Provider Source details.
 - **Created Date** – This displays the date the Provider record was created.
 - **Account Name, First Name** and **Last Name** – This displays the Account name, first and last name details on the Provider Inquiry.
 - **Phone** and **Email Address** – This displays the phone and email address on the Provider Inquiry.
 - **Provider Organization Name** and **Mailing Address** – This displays the name and mailing address details.
Note: For these fields, the information can come from the Provider or the foster parent applicant.
 - **Provider Account Authorized** and **Provider Account Established** – This displays if the Provider account is authorized and established. **Note:** These two fields can be edited.
 - **Race** and **Ethnicity** – This displays the race and ethnicity of the Provider.
 - **County** – This displays the specific county of the Provider.
 - **US Citizenship** – This displays if the Provider holds a US Citizenship.
 5. Click the **Pencil** icon to update the **Status** and select the option from the dropdown. **Note:** The Status field is Pending by default. The options available are:

- Abridge
 - Complete
 - Inactive
 - In Progress
 - Pending
6. Click **Save** to update the Inquiry after reviewing the information.

Knowledge Check!

Question 1: Which tab should be selected from the home dropdown to view an Inquiry?

- A. Application
- B. Provider Inquiry
- C. Provider Search
- D. Tasks

Question 2: How can a user set a different default list view?

- A. Pin a list view to make it the default
- B. Rename the list view to "Default"
- C. Refresh the page after selecting a view
- D. Ask an admin to change it permanently

Module 4: Application Management

This module will introduce the end-to-end process for creating a Foster Family application in C-FIRST! as a DCS staff user. You will learn how to create a Foster Family Application in the system and enter household member details including names, relationships, and required demographic and contact information. While a Foster Family Application may also be submitted through the Provider Portal by a prospective provider, such as a foster parent, this module focuses on the steps DCS staff take to create an application directly in C-FIRST!. This process is used when a DCS worker receives a manual application and no application has been submitted through the Portal.

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

- Create a Foster Family Application
- Complete household member details for the application

Lesson 1: Foster Family Application

In this lesson, you will learn how to create the Foster Family Application, explore the tabs and sections of the application, and assign a worker to the application.

This lesson introduces the next step in the Geller Family scenario, creating the Foster Family Application in C-FIRST!. Once their inquiry is accepted, you will focus on creating the application from within C-FIRST!, so that all the Geller household information is captured correctly and completely so reviews, documentation, and licensing activities can proceed without rework.

Learning Objectives:

- Create a Foster Family Application
- Verify the application record is complete and ready for the next steps in the Provider onboarding process
- Complete the household details for the application

Task 1: Create the Foster Family Application

To start creating the Foster Family application for the Geller family, follow the steps below:

1. Log in as Foster Care Support Staff and access the **Homepage** screen displays.

2. Navigate to the **Applications** tab from the home dropdown. The **Applications Recently Viewed** screen displays.
3. Click the **New** button on the top right corner of the screen to create a new application. The **New Application** pop-up displays.



System Tip!

The Foster Family Application can also be accessed by navigating to an existing Provider record. Select the **Applications** hyperlink in the **Related List Quick Links** section and view the **Applications** List View. Then, either select an existing Application record with the record type of **Foster Family** or select the **New** button at the top of the screen to create a new Foster Family Application record.

4. Select **Foster Family Application** and click **Next**. The **Foster Family Application** screen displays.
5. In the **Application Information** tab, click the **Application Type** dropdown and select **Foster Family Application**. The options available are:
 - Foster Family Anniversary Reassessment
 - Foster Family Application
 - Foster Family Biannual Reassessment
 - Foster Family Reactivation
 - Licensing Anniversary Reassessment
 - Licensing Application
 - Placement Provider Application
 - Vendor Application

Note: Only select the Foster Family options from the dropdown options.

6. Click the **First Name** field, enter the *first name####*.
7. Click the **Last Name** field, enter the *last name####*.
8. Click **Provider Category** dropdown and select from the list of options. **Note:** For a Foster Home, select *Direct Provider*. Parent Organization Provider applies to DCS or Placement Providers, and Both is used only when both roles apply. The options available are:

- Both
 - Direct Provider
 - Parent Organization Provider
9. Click **Provider Organization Name** field, enter the *organization name*.
 10. Click **Name** field, enter the *name*.
 11. Click **Address Line 1** field, enter the *address*.
 12. Click **City** field, enter the *city*.
 13. Click **County** dropdown, select the *county*.
 14. Click **Submission Date** field, select the *date*.
 15. Click **Status** dropdown, select the relevant status. The options available are:
 - Approved
 - Closed
 - Completed
 - Denied
 - In Progress
 - Inquiry
 - Withdrawn
 16. Click **Work/Cell Telephone Number** field, enter the *telephone number*.
 17. Click **Primary Language** dropdown, select the *language* from the options.
 18. Click the **Email Address** field, enter the *email address*.
 19. Click the **Social Security Number** field, enter the *social security number*.
 20. Click the **Address Line 2** field, enter the *address*.
 21. Click the **State** dropdown, select the *state*.
 22. Click the **Zip Code** field, enter the *zip code*.
 23. In the **Demographic Information** section, click the **Date of Birth** field, enter the *date of birth*.
 24. Click the **Race** dropdown, select the *race*.
 25. Click **Religion/Affiliation** dropdown, select the *religion*.
 26. Click **Military Service** dropdown, select the option.
 27. Click **Legal TN resident for last 3 months?** dropdown, select the option.
 28. Click **Is there a Co-Applicant in the Home?** dropdown, select from the options. **Note:** If Co-Applicant is set to Yes, an

additional set of related questions will display and must be completed.

29. Click **Gender** dropdown, select from the options.
30. Click **Hispanic Origin** dropdown, select from the options.
31. Click **Marital Status** dropdown, select the option.
32. Click **Lived out of state for past 5 years?** dropdown, select the option.
33. Click **Employer or In-Home Business?** dropdown select the option.
34. In the **Children** section, click **Primary Caretaker for Child under 18?** dropdown, select the option.
Note: The following **Child 1** section will be visible if **Yes** is selected.
35. The following are the fields that a user needs to complete in the **Child 1** section:
36. Click the **Name** field, enter the *name*.
37. Click the **Date of Birth** field, enter the *date of birth*.
38. Click the **Primary Language** dropdown, select the *language*.
39. Click the **Gender** dropdown, select the *gender*.
40. Click the **If Child in school, which Grade?** dropdown, select the option.
41. Click the **Relationship to you** field, enter the *relationship*.
42. Click the **Social Security Number** field, enter the *social security number*.
43. Click the **Secondary Language** dropdown, select the *language*.
44. Click the **Child Currently in your Home?** dropdown, select the option.
45. Click the **If Employed, child's occupation?** dropdown, select the options.
46. Click the **School** dropdown, select the *school*.
50. In the **Other Adults in the Home** section, click **Other Adults 18+ Living in the Home?** dropdown, select **Yes**.
51. In the **Adult 1** section, click the **Name** field, enter the *name*.
52. Click the **Date of Birth** field, enter the *date of birth*.
53. Click the **Primary Language** dropdown, select the *language*.
54. Click the **Gender** dropdown, select the *gender*.
55. Click the **Relationship to you** field, enter the *relationship*.
56. Click the **Social Security Number** field, enter the *social security number*.

57. Click **If Employed, Adult's occupation?** dropdown, select the option. The options in the dropdown are:
- Agricultural
 - Clerical/Office
 - Craftsman
 - Laborer - Skilled
 - Laborer - Unskilled
 - Management/Administrative
 - Migrant Worker
 - Military Service
 - None
 - Other
 - Professional
 - Retail
 - Sales
 - Self-Employed
 - Service Work
 - Unknown
58. In the **Applicant Reference (Relative)** section under **References from Individuals Not Currently Living in the Home** section, click the **Name** field, enter the *name*.
59. Click the **Address** field, enter the *address*.
60. Click the **Email Address** field, enter the *email address*.
61. Click the **Relationship to the Applicant** field, enter the *relationship*.
62. Click the **Phone Number** field, enter the *number*.
63. In the **Additional Reference 1 (Non-Relative)** section, click the **Name** field, enter the *name*.
64. Click the **Address** field, enter the *address*.
65. Click the **Email Address** field, enter the *email address*.
66. Click the **Relationship to the Applicant** field, enter the *relationship*.
67. Click the **Phone Number** field, enter the *number*.
68. The following are the fields that a user needs to complete in the **Additional Reference 2 (Non-Relative)** section:
69. Click the **Name** field, enter the *name*.
70. Click the **Address** field, enter the *address*.
71. Click the **Email Address** field, enter the *email address*.

72. Click the **Relationship to the Applicant** field, enter the *relationship*.
73. Click the **Phone Number** field, enter the *number*.
74. The following are the fields that a user needs to complete in the **Additional Reference 3 (Non-Relative)** section:
75. Click the **Name** field, enter the *name*.
76. Click the **Address** field, enter the *address*.
77. Click the **Email Address** field, enter the *email address*.
78. Click the **Relationship to the Applicant** field, enter the *relationship*.
79. Click the **Phone Number** field, enter the *number*.
80. The following are the fields that a user needs to complete in the **Type of Child You Hope to Parent** section:
81. Click the **Minimum Child Age** field, enter the *age*.
82. Click the **Kinship Only** dropdown, select the option.
83. Click the **Teen Mothers** dropdown, select the option.
84. Click the **Maximum Child Age** field, enter the *age*.
85. Click the **Sibling Group** dropdown, select the *sibling group*.
86. Click the **Gender**, select the right arrow icon to select the *gender* from the Available section.
87. In the **Previous Experience with DCS** section, click the **Previous involvement with TN DCS?** dropdown, select the option.
88. Click the **Applied to foster/adopt elsewhere?** dropdown, select the option.
89. Click the **How did you hear about our agency?** field, enter the information.
90. In the **Previous History with Law Enforcement** section, click the **Any Crimes Involving Children?** dropdown, select the option.
91. Click the **Any crimes of violence against another person?** dropdown, select the option.
92. Click the **Possession, sale, manufacturing, or transportation of drugs?** dropdown, select the option.
93. Click the **Any other crimes?** dropdown, select the option.
94. The following are the fields that a user needs to complete in the **Signature** section:
95. Click **Applicant Signature** dropdown, select the option.
96. Click **Date** field, enter the *date*.

97. The following are the fields that a user needs to complete in the **Assignment Information** section:
98. Click the **Assigned Supervisor** field, enter the *supervisor*.
99. Click the **Assigned Worker** field, enter the *worker*.
100. The following are the fields that a user needs to complete in the **Navigation Links** section:
101. Click the **Provider** field, enter the *Provider's name*.
102. Click the **Provider Type** field, enter the *Provider type*.
103. Click the **Agreement** field, enter the *agreement*.
104. Click **Save**. The **Application Requirements** tab displays.

Task 2: Complete the Household Details

After entering the Application Information section for the Foster Family application, proceed with Application Requirements section to complete the details for the members of the household.

1. Navigate to the **Application** tab on the home dropdown. The **Applications** list view displays.
2. Click the **Application Number** hyperlink to open the application details.
3. Navigate to the **Application Requirements** tab below to enter the **Household Member** information.
4. The following are the fields that a user needs to complete in the **Required Attachments: Members of the Household** section of **Application Requirements** tab:
5. Click **Fingerprint Cards** dropdown, select from the list of options.
6. Click **Notice of Privacy Practices** dropdown, select from the list of options.
7. Click **Agreement for Criminal History Checks** dropdown, select from the list of options.
8. Click **Waiver for Criminal Convictions** dropdown, select from the list of options.
9. Click **Child Medical Reports** dropdown, select from the list of options.
10. Click **Foster Parent Medical Reports** dropdown, select from the list of options.

11. Click **Vaccine Exception Declaration** dropdown, select from the list of options.
12. Click **Medical Self Reports** dropdown, select from the list of options.
13. Click **Birth Certificates** dropdown, select from the list of options.
14. Click **SSN Cards** dropdown, select from the list of options.
15. Click **Drivers Licenses** dropdown, select from the list of options.
16. Click **HIPAA Release of Information** dropdown, select from the list of options.
17. Click **Marriage and/or Divorce Decrees** dropdown, select from the list of options.
18. Click **Foster Parent Applicant Questionnaire** dropdown, select from the list of options.
19. Click **Notes** field, enter any information that is related to the application.
20. The following are the fields that a user needs to complete in the **Required Attachments: Foster Family** section:
21. Click **Foster Home Disaster Plan** dropdown, select from the list of options.
22. Click **Discipline Policy** dropdown, select from the list of options.
23. Click **Oath to Abide** dropdown, select from the list of options.
24. Click **Placement Acceptance Acknowledgement** dropdown, select from the list of options.
25. Click **Eco Map** dropdown select from the list of options.
26. Click **Contingency Plan** dropdown, select from the list of options.
27. Click **Monthly Income & Expenditure** dropdown, select from the list of options.
28. Click **Proof of Income** dropdown, select from the list of options.
29. Click **W9** dropdown, select from the list of options.
30. Click **Family Photo** dropdown, select from the list of options.
31. Click **Fire Escape plan** dropdown, select from the list of options.
32. Click **Adoption Orders** dropdown, select from the list of options.

33. Click **Auto Registration and Insurance** dropdown, select from the list of options.
34. Click **Pet Rabies Verification** dropdown, select from the list of options.
35. Click **Death Certificates** dropdown, select from the list of options.
36. The following are the fields that a user needs to complete in the **Requirements: Members of the Household** section:
37. Click **Fingerprint Results** dropdown, select from the list of options.
38. Click **Background Check Completed** dropdown, select from the list of options.
39. Click **Adam Walsh Out-of-State Checks** dropdown, select from the list of options.
40. Click **MVR Check** dropdown, select from the list of options.
41. The following are the fields that a user needs to complete in the **Requirements: Foster Family** section:
42. Click **Reference Letters Sent** dropdown, select from the list of options.
43. Click **Reference Letters Received Back** dropdown, select from the list of options.
44. Click **POPS Assessment** dropdown, select from the list of options.
45. Click **Notes** field, enter information available for the Foster Family.
46. Click **Save**, the household details for the application are entered.

Knowledge Check!

Question 1: Which option should you select from the dropdown to create a new Foster Family Application?

- A. Foster Family Anniversary Reassessment
- B. Foster Family Application
- C. Provider Record Update
- D. Application Closure

Question 2: Where can a user open the Applications List View for Foster Family Applications?

- A. Only from the Home page dashboard
- B. Access from Reports tabs
- C. Applications tab, or from a Provider record via Applications
- D. From the Provider search screen

Module 5: Provider Setup

Using the Geller Family scenario, this module shows how DCS Staff track key Provider information such as background checks, training completion, and address details to support the Provider approval process, oversight, and compliance.

This module includes three key related areas that support Provider oversight and compliance: Criminal History Background Checks and Training Activities.

Criminal History Background Checks capture background check records for each Provider Person including details like: Background Check ID, Status, and allow multiple records over time to reflect rechecks or updates. Training Activities record a Provider Person's completed Training, Training Type and its associated details.

The Provider Address Related List and Screen are used to associate addresses using Smarty lookup. The Smarty validated field is a system generated unique identifier assigned when an address is successfully validated.

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

- Create Provider record, view Provider details and Associate Provider persons
- Add Provider Address using Smarty
- Update Criminal History and Training details for Provider

Lesson 1: Create Provider Record and Associate Provider

In this lesson, you will move on with the Geller Family scenario from application intake into Provider setup and activities in C-FIRST!. You will create the Geller family's Provider record and associate it with the application. You will learn to review key Provider details, add address, associate the person to the Provider and review information that will be used throughout foster home approval. This lesson establishes the foundation for tracking the household over time, including where the Provider is located, who is associated with the Provider, and how background checks, and training will tie back to the Provider record.

Learning Objectives:

- Create Provider record and Associate Provider with the application
- Add Provider Person
- Add Provider Address



Process Tip!

Before creating a new Provider record, users must first search for an existing Provider with similar information to avoid duplicates. After selecting **Next** on the **New Provider** screen, the system automatically navigates you to the **Provider Search** screen to complete this check.

Task 1: Create a New Provider Record

After searching for the Provider Record on the Application, if no matching record is found of pre-existing Providers to link an application, follow the steps below to create a new Provider from an Application:

1. Navigate to the **Applications** tab, the **Applications Recently Viewed** list displays.
2. Click on the **Application Number** hyperlink to select an existing **Application**.
3. Click **Create New Provider** button to create a new Provider from the existing Application. The **Provider Search** screen displays. **Note:** Every time you create a New Provider, either through **Provider** tab, **Application** tab or **Provider Search** you will have to go through the Provider Search. This is to avoid the duplication of any existing Provider record.
4. Click the **First Name** field on the **Search By Provider Detail** section, enter the *first name####*.
5. Click **Search**. The search results screen displays.
Note: If the Provider is found and already exists, select the Provider record that you want to review. Click the dropdown at the far end of the screen of the selected record, there are two options, **View** and **Associate**.

6. Click the **New Provider** button to create a new Provider if the Provider is not found. The **New Provider** pop-up screen displays.
7. In the **Provider Information** section, click the **Account Name** field, enter the *account name*. **Note:** Complete this information based on the Provider Application.
8. Click the **First Name** field, enter the *first name####*.
9. Click the **Last Name** field, enter the *last name####*.
10. Click the **Provider Category** dropdown. Select from the list of options. The options in the dropdown are:
 - Both
 - Direct Provider
 - Parent Organization Provider
11. Click the **Provider Organization Name** field and select *provider*.
12. Click the **Network Provider?** Dropdown. Select from the list of options.
13. Click the **Website** field, enter the *website*.
14. Click the **Marital Status of the Foster Parent** dropdown. Select from the list of options.
15. Click the **Organization Phone** field, enter the *number*. **Note:** This field refers to Foster Home's phone number.
16. Click the **Ext** field, enter the *ext*.
17. Click the **Ext** field, enter the *ext*.
18. Click the **Email** field, enter the *email address*.
19. Click the **Primary Contact Name** field, enter the *name*.
20. Click the **Special Educational Capabilities** dropdown. Select from the list of options.
21. Click the **Facility Type** drop-down, select from the option. The options in the drop-down are:
 - Child Abuse Prevention Agency
 - Child Placing Agency
 - Detention
 - Family Boarding Home
 - Foster Home
 - Group Care Home
 - Group Home
 - Incarceration
 - Independent Living Program

- Juvenile Detention Center
- Maternity Home
- Medical Inpatient Facility
- Multi Facility
- Non-Residential Service Provider
- Non-Traditional Childcare Agency
- Psychiatric Inpatient
- Residential Care Agency
- Residential Treatment Center
- Runaway House
- Shelter
- Temporary Holding Resource

Task 2: Complete Child Preferences and Provider Details

1. The following are the fields that a user can complete in the **Child Preferences** section if needed:
 - Click the **Preferred Number of Children** field, enter the *number of children*.
 - Click the **Preferred Number of Siblings**, select the right arrow icon to select the *number of siblings* from the Available section.
 - Click the **Preferred Minimum Age** field, enter the *age*.
 - Click the **Preferred Maximum Age** field, enter *age*.
 - Click the **Preferred Ethnicity** dropdown, select the *ethnicity*.
 - Click the **LGBTQ+** dropdown. Select from the list of options.
 - Click the **Preferred Language Spoken at Home** dropdown, select the *language*.
 - Click the **Second Language** dropdown, select the *language*.
 - Click the **Family Situation**, select the right arrow icon to select from the list of options from the Available section.

The options in the **Available** section are:

 - Birth Parent(s) are Incarcerated
 - Is Committed to Extracurricular Activities
 - Requires a Stay-at-Home Parent
 - Requires Frequent Visitation with Parents
 - Click the **Preferred Gender**, select the right arrow icon to select the *gender* from the Available section.

- Click the **Preferred Race**, select the right arrow icon to select the *race* from the Available section.
 - Click the **Medical/Physical Preferences**, select the right arrow icon to select the *preference* from the Available section. The options in the **Available** section are:
 - Bedwetting
 - Encopretic
 - Enuretic
 - Hearing Impaired or Deaf
 - Medically Needy
 - Needs Mental Health Services
 - Pregnant/Parenting
 - Special Accommodations for Physical Disability
 - Special Diet/Dietary Restrictions
 - Visually Impaired or Blind
 - Click the **Developmental/Behavioral Preferences**, click the right arrow icon to select the relevant *preference* from the Available section.
2. The following are the fields that a user can complete in the **Reference Numbers** section, if needed:
- Click the **SSN** field, enter the *social security number*. **Note:** For training purposes, this should be a fictitious number and not the user's real SSN.
 - Click the **FEIN** (Federal Employer Identification Number) field, review the information. **Note:** Foster Homes will not have a FEIN, this will apply to agency providers.
 - Click the **UEI#** (Unique Entity Identifier) field, review the information.
 - **Note:** The FEIN and UEI# are steps that a Foster Care Support staff do not enter. Foster Care Support staff may need to view this field if a provider has questions or concerns.
 - Review the **Created in Edison?** field.
 - Review the **Edison Supplier ID** field, the system auto populates the Provider's Edison Supplier ID.
3. The following are the fields that a user can complete in the **Organization Information** section, if needed:
- Click the **Business Type** dropdown and select the *business type*.

- Click the **Incorporation Status** dropdown, select the *status*.
 - Click the **Other Incorporation Status** field, enter the information.
 - Click the **Minority Status** dropdown, select the *status*. The options in the dropdown are:
 - Female (51% ownership)
 - Minority (51% ownership)
 - Not a Minority
 - Click the **Small Business?** dropdown. Select from the list options.
 - Click the **# of Years of Business** dropdown. Select from the list of options.
4. The following are the fields that a user can complete in the **Facility/Home Information** section, if needed:
 - Click the **Male Capacity** field, enter the *capacity*.
 - Click the **Female Capacity** field, enter the *capacity*.
 - Click the **Gender Neutral Capacity**, enter the *capacity*.
 - Click the **Pets** dropdown, select from the list of options.
 5. The following are the fields that a user can complete in the **ICWA Information** section, if needed:
 - Click the **Foster Parent 1 Membership or Eligible for Membership?** dropdown, select from the list of options.
 - Click the **ICWA Eligible?** dropdown, from the list of options.
 - Click the **Foster Parent 2 Membership or Eligible for Membership?** dropdown, select from the list of options.
 - Click the **ICWA Eligible?** dropdown, select from the list of options.
 6. Review site address and update the school, as needed, for the following fields within the **Site Address/School** section: **Provider Site Address ID, School County, Elementary School, Middle School, High School.**
 7. The following are the fields that a user can update in the **Assignment Information** section, if needed:
 - Click the **Assigned Supervisor** field, enter the *supervisor*.
 - Review the **Assigned Worker** field.
 8. Click **Save**. The Provider record screen displays.
Note: Every time you create a **New Provider**, either through **Provider** tab, **Application** tab or **Provider Search** you will

have to go through the **Provider Search**. This is implemented to avoid the duplication of any existing Provider record.

Task 3: Add Provider Address

To document a new address for the Provider, follow the steps below:

1. Navigate to the desired Provider record from the **Provider** tab.
2. Click the **Provider Addresses** hyperlink on the **Related List Quick Links** section. The **Provider Addresses** list view displays.
3. Click **New** button on the far-right corner to create a new record. The **New Address** Search Screen displays.
4. Click the **Address** field and enter the address. **Note:** As you begin typing the Address field, the system auto-completes the functionality to display a list of matching addresses.
5. Hover over near the magnifying glass icon next to the field and select the desired address from the list.
Note: Once an address is selected, the system automatically populates the **Address Line 1, Address Line 2, City, State, Zip Code, County**, and **Country** fields.
6. Click the **Search** button and proceed.



System Tip!

If there are no matching records found, a message stating 'There are 0 records matching the provided search criteria. Please update your search criteria and try again.' will display. If there are records that match, a table will be populated with all the potential matches. You can review and associate the applicable address(es) to the Provider. After the address search has been completed and there are no address(es) that can be associated, the New button can be utilized to add a new address into the system.

7. Click the **New Address** button to enter any other relevant details related to the specific address.
8. Click **Save**, the **Provider Address Details** screen is displayed.
9. Click **Address Type** dropdown in the **Address Detail** section and select from the following options:

- Mailing
- Remittance
- Site
- Temporary Address

Note: The Site address is the physical location of the foster home.

10. Click **Start Date** field and enter the *date*.
11. Click **Save** button to finalize the Provider Address.
12. Repeat the steps to add an active Mailing address.



Process Tip!

The Provider needs exactly one active Mailing address and one active Remittance address. The site address is the physical location of the foster home. Only one Mailing Address can be Active at a time.

Task 4: Associate and Create New Provider Persons

To associate and view people connected to a Provider navigate to the Provider Persons Related List and follow the steps below:

1. Navigate to an existing **Provider** record.
2. Click the **Provider Persons** hyperlink on the **Related List Quick Links** section. The **Provider Persons** list view displays the following fields:
 - Provider Person ID
 - PID
 - Last Name
 - First Name
 - Role
 - Phone
 - Email
 - Status

Note: Click an existing **Provider Person ID** hyperlink on the list to view the Provider Person's details.

3. Click **New Provider Person** button on the far-right corner of the screen to begin creating a new Provider Person. The **Search for a Person** screen displays.

4. Enter the Provider Person's search criteria and click **Search**. The search results display.
5. Select the required Provider Person from the search results.
Note: If the Person is not found, click the **New Person** button to proceed. When the desired person is found, associate or view the Person.
6. Click the dropdown in the far-right corner of the selected person record. The options displayed are **View** and **Associate**.
Note: To view the Person record click **View** Button.
7. Click **Associate** and complete the information necessary to associate the person with the Provider. The **New Provider Person** pop-up displays.
8. The Information section displays the following fields:
 - **Provider** – displays the Provider's name
 - **Person** – displays the Person's name
 - **Status:** The options available for the dropdown are:
 - Active
 - Inactive
 - Pending
9. Click **Application** field to select the application.
10. Click **Date Effective** field to enter the *date*.
11. Click **Role** dropdown, select the relevant option from the dropdown.
12. Click the **Payee?** field and select *Yes*.
13. Click **Occupation** field, enter the *occupation*.
14. Click **Consent for Mailing Lists** and select from the list of options.
15. Click **Driver's License State** and select the *state* from the dropdown.
16. Click **Provider Portal Account Notification** and select the option.
17. Click on **ICPC** and select the option.
18. Click **Emergency Phone** and enter the *phone number*.
19. Click **Save** and the system will create the **Provider Person Association** on the **Person** record.
20. Navigate back to the **Person** record and hover over the **Provider Person Association** hyperlink. The Provider Person Association list view displays the associated Provider with the following fields:

- Provider
- Date Effective
- Date Ended
- Status

**Process Tip!**

You will not be able to create a Provider Person unless a Person record already exists in the system. When you begin the Provider Person process, you will be prompted to enter the person's details to confirm an existing Person record. If no matching Person record is found, create the Person record first, then return to create the Provider Person. **Note:** To create a new Person record, click New Person, enter the required details including first name, last name, and any other mandatory fields marked with an asterisk, then click Save. After the record is saved and the confirmation message appears, click Generate PID to assign a unique Person Identifier.

Lesson 2: Review Provider Criminal History & Training and Waiver Information

In this lesson, you will continue with the Geller Family scenario by focusing on the compliance information that must be reviewed and tracked before the Geller family can move forward in the approval process. You will review each Provider Person's Criminal History Background Check records, confirm required Training Activities are documented, and examine any Waivers tied to the Provider record. By validating these items in C-FIRST!, you will confirm the Provider record reflects current eligibility and readiness for next steps such as home visits, approval decisions, and eventual placements.

Learning Objectives:

- Review and entering of Criminal History Record information
- Review and entering of Provider Waiver Record information
- Review Provider Training Record and History Information

Task 1: Review of Criminal History

The Criminal History Background Checks Related List displays and tracks background checks for a Provider Person, supporting the safety and well-being of children by identifying criminal behavior that could pose a risk.

1. Navigate to the desired Provider record and click the **Provider Persons** hyperlink on the **Related List Quick Links** section. The **Provider Persons** screen displays.
2. Click the **Provider Person ID** hyperlink. The **Provider Person** record screen displays.
3. Click **Criminal History Background Checks** hyperlink on the **Related List Quick Links** section. The **Criminal History Background Checks** screen displays.
4. The list view displays the **Criminal History Background Check ID** as a hyperlink, **Record Created Date**, **Case Name** as a hyperlink and **Status**.
5. Click **New**. The **New Criminal History Background Checks** screen displays for the Provider Person.
6. Navigate to the **Information** section to complete the following fields. Complete any required fields as per policy.

Note: The Provider Person captures the name of the Provider Person the background check is for. This field displays any additional information related to the record.

7. Click the **Assigned Worker** field and search for the name of the assigned worker.
8. Click the **Records Uploaded** drop-down and select the appropriate option.

Note: This field is the confirmation that the worker has uploaded all records for each registry record.

9. Click the **National Sex Offender Registry Found?** drop-down and select the appropriate option.

Note: This field captures whether a record was found for the individual during a check of the National Sex Offender Registry (NSOR), a federally mandated registry search conducted for provider persons (e.g., foster parents, household members, etc.).

10. Click the **Tennessee Sex Offender Registry Found?** drop-down field and select the appropriate option.
11. Click the **Tennessee Sex Offender Check Date** and enter the date the record was checked.
12. Click the **DCS History Search Found?** drop-down and select the appropriate option.
13. Click the **DCS History Search Check Date** and enter the date the record was checked.
14. Click the **Felony Offender Registry Found?** drop-down and select the appropriate option.
15. Navigate to the **Other Background Checks** section to complete the following fields. **Note:** Policy should be referenced for the TN Felony Offense Registry.
16. Click the **Fingerprint Cards** drop-down and select the appropriate option.
17. Click the **Fingerprint Card Check Date** and select the date on which the fingerprint cards were checked.
18. Click the **Fingerprint Card Check Date** and select the date on which the fingerprint cards were checked.
19. Click the **Drivers Licenses** drop-down and select the appropriate option.
20. Click the **Adam Walsh Out-of-State Checks** drop-down and select the appropriate option.

21. Click the **Waiver for Criminal Convictions** drop-down and select the appropriate option.
22. Navigate to the **Dept Health Vulnerable** section to complete the following fields.
23. Click the **Dept. of Health Abuse Registry Found?** drop-down and select the appropriate option.
24. Click the **Dept. of Health Abuse Registry Check Date** and enter the date the record was found.
25. Click the **Drug Offender Registry Found?** drop-down and select the appropriate option.
26. Navigate to the **Local Criminal Background Checks** section to complete the following fields.
27. Click the **Local Offender Registry Found?** drop-down and select the appropriate option.
28. Click the **Local Offender Registry Check Date** and enter the date the record was checked.
29. Click the **Local Jurisdiction Checklist** drop-down and select the appropriate option.
30. Navigate to the **Navigation Links** section which displays quick links to related records for the associated Person, Person Type ID and the Provider record.
31. Click **Save**. **Note:** Click the **Pencil** icon to make any updates or edits to the record.



System Tip!

To create a new record, navigate to and select the **New** button. This will open the **New Criminal History Background Checks** screen. The field for the new record is identical to the fields displayed on the above **Detail** screen.

Task 2: Review Training Information

The Training Activities Related List and Screen captures the training type, training hours, completed hours, date and the description details of a Provider Person's trainings completed.

1. Navigate back to the **Provider Person's** record.
2. Click **Training Activities** hyperlink from the **Related List Quick Links**. The **Training Activities** list view displays the options:

- Other Approved
 - Required Course
 - Required Specialty Course
 - Therapeutic Course
 - Trauma/Therapeutic Courses
3. The list view displays the **Training Activities Name** as a hyperlink, **Type, Name, Completed Hours** and **Expiration Date**.
 4. Click the **Training Activity Name** hyperlink to review the training information.
 5. The **Training Activity Information** section has the following fields: **Type, Name, Description, Date, Expiration Date, Training Hours, Completed Hours**. **Note:** Click the pencil icon to edit any field.
 6. Review the **Provider** section for the following fields: **Provider, Provider Person**.



System Tip!

To create a new training record, navigate to and select the **New** button. This will open the New Training Screen. The field for the new record is identical to the fields displayed on the above **Detail** screen.

Task 3: Review Provider Waiver Information

The Waiver Related List and Screen capture details and information regarding Waivers on the Provider record. Waivers can be associated to Provider records and are useful for storing updated information associated with a Provider. The Provider Waivers can be viewed through the Waivers Related List.

1. Navigate back to the **Provider Person's** record.
2. Click the **Waivers** hyperlink on the **Related List Quick Links** section. The **Waivers** screen displays.
3. The list view displays the **Waiver Type** as a hyperlink, **Waiver Reason, Status, Date Effective**, and **Expiration Date**.
4. Click **New**. The **Waiver Details** screen displays.

5. The **Details** tab displays the following sections: **Waiver Details**, **Criminal Convictions Waiver**, **Approval History**, **Navigation Links** and **System Information**.
6. Click the **Waiver Type** drop-down to select the type of waiver created.
7. Click into the **Waiver Reason** field and enter the waiver reason.
8. Click the **Date Effective** field and enter the date the waiver was created.
9. Click the **Document Attached?** drop-down and select the appropriate option.
10. Navigate to the **Training/Education Waiver** section to complete the following fields.
Note: This section will update based on the type of waiver selected in the **Details** section.
7. Click the **Type of Training** drop-down and select the type of training.
8. Click the **CPR/First Aid** drop-down and select the appropriate option.
9. Click the **CPR/First Aid Expiration Date** field and enter the date.
10. Navigate to the **Approval History** section to enter the following fields.
11. Click the **Assigned Worker** field and enter the worker.
12. Click the **Approver** field and enter the approver.
13. Navigate to the **Navigation Links** section which provides quick links to related Provider record and application.
14. Click **Save**. The **Training Requirement Waiver** details screen display.
15. Click **Submit for Approval**. The **Submit for Approval** pop-up displays.
16. Click **Comments** field, enter the *comments*.
17. Click **Submit**. The Waiver is submitted for approval.

Knowledge Check!

Question 1: When creating a New Provider, why must you complete the Provider Search step first?

- A. To prevent creating duplicate provider record
- B. To assign the provider to a case automatically
- C. To generate the provider ID before data entry
- D. To skip entering provider details if not required

Question 2: How do you view an existing Provider Person's details?

- A. The Related Quick Links section
- B. Click an existing Provider Person ID hyperlink
- C. They are listed on the Home page
- D. You can't view them once they have been created

Module 6: Provider Type Management

This module will introduce the Foster Family Provider Type related list in C-FIRST! as a DCS staff user. You will learn how this area is used to view and manage Provider Type records for a Provider who is approved, or in the process of being approved, as a foster parent. The module will show you how to access the Provider Types list view by selecting the Provider Types hyperlink in the Related List Quick Links section. From there, you will learn how to open an existing Provider Type record with the record type Foster Family or create a new Foster Family Provider Type.

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

- Create a New Provider Type
- Manage Provider Status

Lesson 1: Create Provider Type

Task 1: Create a Foster Family Provider Type

The Foster Family Provider Type Related List and Screen capture a Provider that is approved or in the process of being approved to provide Foster care services and receive Foster Care Placements.

1. Log in as **Foster Care Support**, the **Homepage** screen displays.
2. Click **Provider** tab from the home dropdown, the **Recently Viewed Provider** list view displays.
3. Select the **Account Name** hyperlink to open the Provider details. **Note:** This field displays the Account Name/Last Name of the associated Provider.
4. Click the **Provider Type** hyperlink on the **Related List Quick Links**. The **Provider Type** list view displays the following fields: **Provider Type ID, Record Type, Status, Date Effective**.
5. Click **New** to create a new Provider Type. The **New Provider Type** screen displays.
6. Select **Foster Family** radio button and click **Next**. The **New Provider Type: Foster Family** screen displays.
7. The **Information** section displays the following fields.

8. Click **Status** to change the status. **Note:** By default, this field is set to **Pending Approval**. The other options available for the dropdown are:
 - Abridge
 - Active
 - Applicant
 - Applicant Denied
 - Application Closed
 - Closed
 - Closed – Doesn't Require Review
 - Closed – Require Review
 - Inquiry
 - On Hold
 - Suspended Admissions
9. Click **ICPC Home Indicator** dropdown and select from the list of options.
10. Click **Date Effective** field and enter the *date*.
11. Click **Date Ended** field and enter the *date*.
12. Click **Assigned Supervisor** field to enter the *supervisor's name* if needed.
13. Click **Assigned Worker** field and select the *worker's name*.
Note: The Assigned Worker field is a mandatory field.
14. Click **Application** field and select the *application*.
Note: The **Provider** field is populated with the **Provider Name** by default.
15. Click **Save** button to proceed, the **Provider Type** screen displays and a **Provider Type** record is created.

Lesson 2: Home Visit & Study

In this lesson, you will continue with the Geller family, focusing on creating a Home Visit and Study. You will then manage the Provider Status field based on where the family is in the application and approval lifecycle.

Learning Objectives:

- Create a New Home Visit
- Create a Home Study
- Complete the Application Disposition

Task 1: Create a New Home Visit

1. Click the **Provider Management Actions** hyperlink, from the **Related List Quick Links** section. The Provider Management Actions screen displays the list with **Provider Action ID**, **Record Type**, **Status**, **Created Date**, **Last Modified Date**, and **Last Modified By**.
2. Click **New**, to create a new Provider action record. The **New Provider Action** pop-up displays.
3. Select **Home Visit** radio button and click **Next**. The **New Provider Action: Home Visit** screen displays.
4. You need to complete the following fields in the **Information** section:
5. Click the **Visit Date** field, enter the *date*.
6. Click the **Visit Type** dropdown, select the option. The options in the dropdown are:
 - Annual
 - Biannual
 - Monthly
 - Pre-Approval
 - Quarterly
 - Unannounced
7. Click the **Notes** field, enter the *notes*.
8. Click the **Home Visit Overall Compliance** dropdown, select from the list of options.
9. Scroll down to the **Approval Information** section.
10. Click the **Assigned Worker** field, enter the *assigned worker*.
Note: The Assigned Worker field is mandatory.
11. Click the **Assigned Supervisor** field, enter the *assigned supervisor*.
12. Click **Save**. A new Home Visit record has been created successfully.
13. Click the **Home Safety Item** hyperlink from the **Related List Quick Links** section. The **Home Safety Item** list view displays.
14. Click **New**. The **New Home Safety Item** screen displays.
15. You need to complete the following fields in the **Information** section:
16. Click the **Type** dropdown, select from the list of options. The options in the dropdown are:

- Automobile Safety
 - Fire Safety
 - Household Requirements
 - Means of Communication
 - Medicines and Hazardous Substances
 - Pets
 - Sleeping Arrangements
 - Specific Safety Precautions
 - Water Source
 - Weapons
17. Click the **Item** field, enter the *item*.
 18. Click the **Comments** field, enter the *comments*.
 19. Click the **In Compliance** dropdown, select *Yes*.
 20. Click **Save**. A new Home Safety Item record has been created successfully.
 21. Click the **Persons Involved** hyperlink from the **Related List Quick Links** section. The **Persons Involved** list view displays.
 22. Click **New**. The **New Person Involved: Provider Action Person Involved**.
 23. Click the **Provider Person** field and select your *Provider Person*.
 24. Click the **First Name** field and enter the *first name*.
 25. Click the **Last Name** field and enter the *last name*.
 26. Click the **Role** drop-down and select the *role*.
 27. Click **Save**. The **Persons Involved** screen displays.
 28. Navigate back to the **Provider Action** screen and click the **Submit for Approval** button in the upper right corner.

Task 2: Home Study

The Home Study Related List and Screen capture a Provider Management Action that is accessible on a Provider Type with the type of Foster Family. The Home Study will be used to record and track home studies.

1. Click the **Provider Management Actions** hyperlink, from the **Related List Quick Links** section. The Provider Management Actions screen displays the list with **Provider Action ID**, **Record Type**, **Status**, **Created Date**, **Last Modified Date**, and **Last Modified By**.
2. Click **New**, to create a new Home Study action record.

3. Select **Home Study** radio button and click **Next**. The **New Provider Action: Home Study** screen displays.
4. You need to complete the following fields in the **Information** section:
5. Click the **Visit Date** field, enter the *date*.
6. Click the **Visit Type** dropdown, select the option. The options in the dropdown are:
 - Annual
 - Biannual
 - Monthly
 - Pre-Approval
 - Quarterly
 - Unannounced
7. Click the **Motivation for Foster Parenting** field, enter the *notes*.
8. Click the **Home/Neighborhood Description** field, enter the *description*.
9. Click the **Home Study Preparer's Agency** field, enter the *agency*.
10. Click the **Pre-Service Training Experience** field, enter the *training experience notes*.
11. You need to complete the following fields in the **Applicant's Childhood and Adolescence History** section:
 - Click the **Childhood Relationship History** field, enter the *relationship history*.
 - Click the **Childhood Legal/DCS History** field, enter the *history*.
 - Click the **Childhood Well Being History** field, enter the *history*.
12. You need to complete the following fields in the **Applicant's Adulthood History** section:
 - Click the **Adulthood Relationship History** field, enter the *relationship history*.
 - Click the **Adulthood Legal/DCS History** field, enter the *history*.
 - Click the **Is there a Co-Applicant?** dropdown, select the option. **Note:** The **Co-Applicant's Childhood and Adolescence History** section will be auto populated by

C-FIRST! upon selecting **Yes** in the **Is there a Co-Applicant?** dropdown.

13. You need to complete the following fields in the **Co-Applicant's Adulthood History** section:

14. In the **Other Adults in Home History** section, click the **Are there Children in the Home?** Dropdown and select the option.

- Click the **Other Adults in Home Relationship History** field, enter the *relationship history*.
- Click the **Other Adults in Home Relationship History** field, enter the *history*.
- Click the **Other Adults in Home Relationship History** field, enter the *history*.

15. In the **Children in Home History** section, click the **Are There Children Outside the Home?** Dropdown. Select the option.

Note: The **Children Outside the Home History** section will be auto populated by C-FIRST! upon selecting **Yes** in the **Are there Children Outside the Home?** dropdown.

- Click the **Children in Home History** field, enter the *relationship history*.
- Click the **Children in Home History** field, enter the *history*.
- Click the **Children in Home History** field, enter the *history*.

16. You need to complete the following fields in the **Foster Family Information** section:

- Click the **Family Interaction** field, enter the *notes*.
- Click the **Foster Parenting Skills** field, enter the *notes*.
- Click the **Character, Ethics and Values** field, enter the *notes*.
- Click the **Foster Parenting Ability** field, enter the *notes*.
- Click the **Support for Foster Parenting** field, enter the *notes*.
- Click the **References** field, enter the *references*.

17. You need to complete the following fields in the **Approval** section:

- Click the **Assigned Worker** field, enter the appropriate *assigned worker*. **Note:** The Assigned Worker field is mandatory.

- Click the **Assigned Supervisor** field to review or enter the appropriate *assigned supervisor*.
- 18. Click **Save**. A new Provider Action for Home Study has been created successfully.
- 19. Click the **Persons Involved** hyperlink from the **Related List Quick Links** section. The **Persons Involved** list view displays.
- 20. Click **New**. The **New Person Involved: Provider Action Person Involved**.
- 21. Click the **Provider Person** field and select your *Provider Person*.
- 22. Click the **First Name** field and enter the *first name*.
- 23. Click the **Last Name** field and enter the *last name*.
- 24. Click the **Role** drop-down and select the *role*.
- 25. Click **Save**. The **Persons Involved** screen displays.
- 26. Navigate back to the **Provider Action** screen and click the **Submit for Approval** button in the upper right corner.

Task 3: Complete Application Disposition

The Application Disposition task documents the outcome of the application review, including the application type, reason, notes, related provider action, and result. The Application Disposition Provider Management Action related list and screen record the proposed decision for an application to become a specific provider type.

1. Click the **Provider Management Actions** hyperlink from the **Related List Quick Links** section. The **Provider Management Actions** screen displays.
2. Click **New**. The **New Provider Action** pop-up displays.
3. Select the **Application Disposition** radio button and click **Next**. The **New Provider Action: Application Disposition** screen displays.
4. The following are the fields that a user needs to complete in the **Information** section:
 - Click the **Application** field, enter the *application*.
 - Click the **Application Type** dropdown, select the *type of application*. The options in the dropdown are:
 - Foster Family Anniversary Reassessment
 - Foster Family Application
 - Foster Family Biannual Reassessment

- Foster Family Reactivation
 - Licensing Anniversary Reassessment
 - Licensing Application
 - Placement Provider Application
 - Vendor Application
 - Click the **Result Reason** dropdown, select the *reason*.
The options in the dropdown are:
 - Conduct
 - CPS History
 - Criminal Charges/Convictions
 - Documentation Time Frames
 - Financial
 - Home Study Concerns
 - Inadequate Parenting
 - Medical
 - Other
 - Over Capacity
 - Pre-Service Training
 - Voluntary Withdrawal
 - Click the **Notes** field, enter the *notes*.
 - Click the **Related Provider Action** field, enter the appropriate *Provider action*.
 - Click the **Application Result** dropdown, select the result. The options in the dropdown are:
 - Failure to Pursue
 - Intent to Approve
 - Intent to Deny
 - Not Subject
 - Withdrawn
5. The following are the fields that a user needs to complete in the **Approval History** section:
- Click the **Assigned Worker** field, enter the assigned *worker*. **Note:** The Assigned Worker field is a mandatory field.
 - Click the **Assigned Supervisor** field, review the field or enter to update the application's assigned *supervisor*.
 - Click **Save**. The new **Provider Action** has been created successfully.

- Click the **Pencil** icon, to make any updates or edits to the record.
 - Click the **Submit for Approval** button. The **Submit for Approval** pop-up displays.
 - Click **Comments** field and enter the *comments*.
6. Click **Submit**. The **Provider Action** is submitted for approval.

Note: The **Facility Visit** feature is used by DCS staff to record and track site visits for **Licensed Provider** types. From the **Provider Types** related list, staff can access **Provider Management Actions** to create or review a Facility Visit record. Key details include the visit date, visit type, status, notes, assigned staff, compliance, license information, and any related corrective action plan.

Knowledge Check!

Question 1: When creating a Foster Family Provider Type, what is the default Status?

- A. Active
- B. Pending
- C. Closed
- D. Suspended

Module 7: Agreement Management

This module introduces how government child welfare agencies (state, county, or federal) manage formal agreements with Service Providers and how those agreements are translated into deliverable services and rates in the system. You will begin with an existing Provider record:

- To create or view a Foster Family Agreement
- Review the Agreement History audit trail of changes, and
- Manage the records that operationalize the agreement such as Agreement Services, Direct Providers, and Master Service Rates, so that services, responsible for Providers, and applicable rate periods are clearly defined and traceable end to end. **Note:** This is not same as the Daily Contract rate for the Children placed.

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

- Create new Agreement with Providers
- Viewing Agreement History
- View and/or Create Agreement Services
- Reviewing Master Service Rates

Note: Master Service Rates shows the rate records that can be used for a Direct Provider for the selected Agreement Service and period.

Lesson 1: Agreement Services

In the Geller Family case, the agency needs to ensure the selected Provider(s) supporting the family have the right formal agreement in place and that the services, staffing, and rates tied to that agreement are complete and auditable.

In this lesson, you will learn how to create or confirm a Foster Family Agreement, then use Agreement History to validate any updates made during the case timeline. Next, you will review and add Agreement Services to reflect the specific supports being delivered to the Geller Family and finally review the Master Service Rates for the applicable service(s) and time so the Geller Family's services can be administered.

Learning Objectives:

- Create New Foster Family Agreement and Agreement Service
- View Agreement Record and View Agreement History
- Review Master Service rates

Task 1: Create New Foster Family Agreement

1. Navigate to the desired Provider record from the Homepage.
2. Click the **Agreements** hyperlink from the **Related List Quick Links** section. The **Agreements** list view displays the list of Agreement records created for the Provider.

Note: The list view displays the **Agreement ID, Agreement Status, Record Type, Agreement Start Date, and Agreement End Date**.

3. Click **New**, the **New Agreement** screen displays.
4. Select **Foster Family** radio button and click **Next** to create the Foster Family Agreement.

5. You need to complete the following fields in the **Information** section:

- Click the **Agreement Start Date** field, enter the *date*.

Note: For the **Agreement Start Date**, you would use the Foster Home approval start date.

- Click the **Notes** field, enter the *notes*.

6. You need to complete the following fields in the **Provider Information** section:

- Click the **Accepts Number of Children** field, enter the *number*.
- Click the **Accepts Number of Siblings** and select the right arrow icon to select the relevant *number of siblings* from the **Available** section.
- Click the **Accepts Minimum Age** field, enter the *minimum age*.
- Click the **Accepts Maximum Age** field, enter the *maximum age*.
- Click the **Preferred Ethnicity** and select the right arrow icon to select the *preferred ethnicity* from the **Available** section.
- Click the **LGBTQ+** dropdown, select the option.
- Click the **Language Spoken in the Home** dropdown, select the *language*.
- Click the **Second Language** dropdown, select the *language*.
- Click the **Family Situation** and select the right arrow icon to select the *family situation* from the **Available** section.
- Click the **Accepts Gender** and select the right arrow icon to select the *gender accepted* from the **Available** section.
- Click the **Accepts Race** and select the right arrow icon to select the *race accepted* from the **Available** section.
- Click the **Accepts Medical/Physical** and select the right arrow icon to select the *medical/physical* condition from the **Available** section.
- Click the **Developmental/Behavioral** and select the right arrow icon to select the *developmental/behavioral* condition from the **Available** section.

7. You need to complete the following in the **Approval History** section:
 - Click the **Assigned Worker** field, enter the *assigned worker*. **Note:** The Assigned Worker field is mandatory.
 - Click the **Assigned Supervisor** field to review, to update enter the *assigned supervisor*.
8. Click **Save**. A new Agreement has been created successfully.
9. Click the **pencil** icon to edit your agreement details and update the **Status** drop down to *Finalized*.
10. Click **Save**.

Task 2: Create an Agreement Service

1. Navigate to a Provider record from the Homepage.
2. Click **Agreements** hyperlink from the **Related List Quick Links** section. The **Agreements** screen displays.
3. Click the **Agreement ID** hyperlink. The **Agreement ID** screen displays.
4. Click **Agreement Services** hyperlink from the **Related List Quick Links** section to create a new Agreement Service. The **Agreement Services** screen displays the following fields:
 - Service ID
 - Level 1 Service
 - Level 2 Service
 - Level 3 Service
 - Service Start Date
 - Service End Date
 - Payment Type
 - Agreement Service Status
5. Click **Add Services**, to create a new service. The **Associate Services** screen displays.
6. Click the **Any Taxonomy Level Search** field, enter the *level of service*

Note: Service names are stored in **Service Taxonomy**, which is the main list of all applicable services that are available. For Foster Home, you would only select 0000000328 - *Placement - DCS Foster Care* as the service added.
7. Click **Search**. The search results displays.
8. Click the **Agreement Service Status** drop down and select *Finalized*.

9. Click the check box on the desired service record and click **Associate**. The records have been associated successfully.
10. Navigate back to the **Agreement Services** list view. A new **Agreement Service** has been added successfully.

Task 3: View Agreement Record & History List View

View an Agreement Record:

1. Navigate to a Provider record from the Homepage.
2. Click **Agreements** hyperlink from the **Related List Quick Links** section. The **Agreements** screen displays.
3. Click the **Agreement ID** hyperlink. The **Agreement ID** screen displays.
4. Click **Agreement Services** hyperlink from the **Related List Quick Links** section to view an existing Agreement Service.
5. Click the **Service ID** hyperlink. The selected **Agreement Service** screen displays.
6. Review the following under the **Details** tab in the **Information** section:
 - **Service ID** – This displays the system generated unique service ID.
 - **Service Taxonomy ID** – This displays the system generated unique service taxonomy ID.
 - **Level 1 Service** – This displays the Level 1 Service.
 - **Level 2 Service** – This displays the Level 2 Service.
 - **Level 3 Service** – This displays the Level 3 Service.
 - **Case Person** – This captures the child associated with the unique care agreement.
 - **Service Start Date** – This displays the start date of the service.
 - **Service End Date** – This displays the end date of the service.
 - **Payment Type** – This displays the type of payment.
 - **Unit of Service** – This displays the unit of service.
 - **Service County** – This displays the service county.
 - **Is this a unique care agreement service?** – This captures if the service is unique care.
 - **Agreement Service Status** – This displays the status of the agreement service.

- **Male Minimum Age** – This displays the male minimum age.
 - **Male Maximum Age** – This displays the male maximum age.
 - **Female Minimum Age** – This displays the female minimum age.
 - **Female Maximum Age** – This displays the female maximum age.
 - **Notes** – This displays the notes.
7. Review the following under the **Capacity Information** section:
- **Male Capacity** – This captures the number of male capacity the Provider has.
 - **Female Capacity** – This captures the number of female capacity the Provider has.
 - **Gender Neutral Capacity** – This captures the number of gender-neutral capacity the Provider has.
 - **Total Capacity** – This captures the number of total capacity the Provider has.
8. Review the following under the **Exclusion Criteria** section:
- **Preferred Number of Children** – This captures the details about the preferred number of children for placement.
 - **Preferred Number of Siblings** – This captures the preferred number of siblings.
 - **Preferred Gender** – This captures the Provider's preferred gender.
 - **Preferred Race** – This captures the Provider's preferred race.
 - **Preferred Ethnicity** – This captures the Provider's preferred ethnicity.
 - **LGBTQ+** - This captures the Provider's willingness to accept LGBTQ+ placements.
 - **Preferred Language Spoken in the Home** – This captures the Provider's preferred language spoken in the home.
 - **Second Language** – This captures the Provider's preferred second language.
 - **Medical/ Physical Preferences** – This captures the the Provider's medical/ physical preferences.

- **Developmental/ Behavioral Preferences** – This captures the Provider's developmental/ behavioral preferences.
- **Family Situation** – This captures the Provider's preferred family situation of a placement.

Note: For the **Exclusion Criteria** section, select the **Foster Homes** chosen preferences.

9. **Navigation Links** – This section provides quick links to related Provider record and application.
10. **System Information** – This displays the details of who created the record and who last modified it.

View Agreement History List View:

1. To access the **Agreement History List View**, navigate to an existing Provider Record.
2. Click the **Agreements** hyperlink from the **Related List Quick Links** section. Navigate to the desired Agreement Record.
3. Select the **Agreement History** hyperlink from the Related List Quick Link. The **Agreement History List View** displays. The List View displays the following information:
 - Date
 - Field
 - User
 - Original Value
 - New Value

Task 4: Review Master Service Rates

1. Navigate to the desired Provider record. The Provider screen displays.
2. Click the **Agreements** hyperlink from the **Related List Quick Links** section. The **Agreements** screen displays.
3. Click the **Contracted** Record Type hyperlink. The Agreement screen displays.
4. Click the **Agreement Services** hyperlink from the **Related List Quick Links** section. The **Agreement Services** list view displays.
5. Click the desired hyperlink on Service ID. The Agreement Service screen displays.

6. Click the **Master Service Rates** hyperlink on the **Related List Quick Links** section. The **Master Service Rates** list view displays.
7. Review the following fields:
 - **Unit Cost** – This captures the unit cost of the Master Service Rate.
 - **Start Date** – This captures the start date of the dates that the Provider is providing the service under this agreement.
 - **End Date** – This captures the end date of the dates that the Provider is providing the service under this agreement.
 - **Provider** – This captures the Provider associated with the agreement.
 - **Agreement** – This captures the Agreement associated with the Master Service Rate.
 - **Service** – This captures the Service.
8. Click the **Unit Cost** hyperlink to view the details.
9. The Information tab displays the following fields: **Unit Cost, Master Service Rate Start Date, Master Service Rate End Date.**

Task 5: RET Checklist

The RET Checklist Related List and Screen capture a Provider Management Action that is accessible on a Provider Type with the type of Kinship or Foster Family. The RET Checklist will be used to record and track RET checklist requirements. This task is performed by the Resource Eligibility Team Member.

1. Navigate to the desired Provider **Related List Quick Links** section and click the **Provider Types** hyperlink. The **Provider Types** screen displays.
2. Select the **Foster Family** record type from the list.
3. Click the **Provider Management Actions** hyperlink, from the **Related List Quick Links** section. The **Provider Management Actions** screen displays the list with **Provider Action ID, Record Type, Status, Created Date, Last Modified Date, and Last Modified By.**

4. Click **New**, to create a new Provider action record. The **New Provider Action** pop-up displays. **Note:** To view an existing record, click the hyperlink in the **Provider Action ID** column.
5. Select **RET Checklist** radio button and click **Next**. The **New Provider Action: RET Checklist** screen displays.

Note: Following are the fields in the Information section.

6. Click the **Provider Person** field, to enter the *Provider Person*.
7. Click the **Type** dropdown, select from the options. The options in the dropdown are:
 - Adoption
 - Contracted
 - Foster Family
 - Guardianship
 - Independent Living
 - Kinship Provider
 - Licensed Provider
 - Medicaid
 - Non-Contracted
 - Placement Provider
 - Relative Caregiver Program Provider
8. Click the **Local Law Enforcement Check?** dropdown, select the option.
9. Click **National Sex Offender Registry?** dropdown, select the option.
10. Click the **Date** field, enter the relevant *date*.
11. Click the **TN Abuse Registry Check?** dropdown, select the option.
12. Click the **Date** field, enter the relevant date of check.
13. Click the **DCS Database Search?** dropdown, select the option.
14. Click the **Date** field, enter the *date of search*.
15. Click the **Out of State Child Abuse/Neglect Check?** dropdown, select the option.
16. Click the **Date** field, enter the *date of check*.
17. Click the **TBI and FBI Fingerprint Checks?** dropdown, select the option.
18. Click the **Date** field, enter the *date of check*.
19. Click the **Waivers of Any Policy Requirements?** dropdown, select the option.

20. Click the **Date** field, enter the *date*.
21. Click the **TN KEY Training Completion Certificate?** dropdown, select the option.
22. Click the **Date** field, enter the *date*.
23. Click the **Finding** dropdown, select the option. The options in the dropdown are:
 - Compliant
 - Non-Compliant
24. Click the **Date** field, enter the *date*.
25. Click the **Comments** field, enter the *notes*.
26. Click the **Completion Date** field, enter the *date*.
27. Click the **Assigned Assessor** field, enter the *assessor*.
28. Click **Save**. A new Provider Action for RET Checklist has been created successfully.

Task 6: Manage Provider Type Status

To address the requirements for managing provider statuses, follow the steps below:

1. Navigate to the Provider record.
2. Click **Provider Types** hyperlink in the **Related List Quick Links** section. The **Provider Types** list displays. **Note:** The **Provider Types** List View displays the list of **Provider Types** on the Provider including details such as **Provider Type ID**, **Record Type**, **Status**, and **Date Effective**.
3. Click the Foster Family **Provider Type ID** hyperlink to view the record. The **Provider Type** screen displays.
4. Review the following fields in the **Information** section that are system populated:
 - Account Name/Last Name
 - Provider First Name
 - Provider Type
5. Click the **Status** field and choose from the dropdown options to update and change the Provider status as needed.



System Tip!

Users can manage a Provider's status using the **Status** field. Users can deactivate a Provider by setting the **Status** field to **Closed** and entering a valid reason. They can reactivate a

Provider by setting the **Status** field back to **Active** and entering a valid reason again, so the system keeps an auditable status history. Users can also place a Provider on Placement Hold by updating the Status field to **On Hold** on the **Provider Type** record.

Knowledge Check!

Question 1: From an Agreement Service, where do you go to view the rate records?

- A. Provider Inquiry
- B. Provider Persons
- C. Master Service Rates
- D. Provider Management Actions

Question 2: What is the purpose of using Agreement History?

- A. To submit a new incident report
- B. To validate the updates made during the case timeline
- C. To generate invoices automatically
- D. To create a provider appeal

Module 8: Provider Management Actions

In this module, you will learn how to perform key Provider Management Actions that support oversight, compliance, and decision-making across the Provider lifecycle. You will practice how to initiate and document an adverse action and, when necessary, close a Provider, so that the decision is fully supported by recorded activity and accessible history. By the end of the module, you will be able to view or initiate an adverse action conducted on a Provider and, in closure scenarios, change the license type and the adverse action that led to the closure.

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

- Initiate the Provider Management Adverse Action/Close Provider
- Update License type

Lesson 1: Provider Management Action Related List

In this lesson, you will continue working on the Geller family case. You will learn how to use the Provider Management Action related list to quickly view, track, and initiate key actions tied to the Geller family's Provider record. You will be reviewing or initiating an adverse action and, if needed, close the Provider record, and update or change license type.

Learning Objectives:

- Initiate an adverse action or close a Provider in Provider Management
- Update license type

Task 1: Initiate or View the Provider Management Adverse Action

The Adverse Action/Close Provider Related List and screen capture the different actions that are applicable for the associated Provider Types. Follow the steps below to initiate or view the adverse action.

1. Log in and access the **Homepage** screen displays.
2. Click global search field, enter the Provider's name and click to open the record.
3. Click the **Provider Types** hyperlink, on the **Related List Quick Links**. The **Provider Types** list displays the following fields:
 - Provider Type ID
 - Record Type
 - Status
 - Date Effective
4. Locate the Foster Family **Record Type** from the list.
5. Click the **Provider Type ID** hyperlink to view the Provider record. The **Provider Type** screen displays.
6. Click the **Provider Management Actions** hyperlink, on the **Related List Quick Links**. The **Provider Management Actions** screen displays the following fields:
 - **Action ID**
 - **Record Type**
 - **Status**
 - **Created Date**
 - **Last Modified Date**

- **Last Modified By**

7. Click **New** to create a new record. The **New Provider Action** pop-up displays.
8. Select **Adverse Action/Close Provider** radio button to create a record type for capturing Adverse Action/Close Provider management action.
9. Click **Next** to proceed. The **New Provider Action: Adverse Action/Close Provider** screen displays.



System Tip!

The layout of the **New Adverse Action/Close Provider** pop-up screen is identical to the layout of the **Detail** screen when clicked on the **Provider Action ID** to view an existing **Adverse Action/Close Provider** record.

10. In the **Information** section, click **Adverse Action Type** dropdown, select from the list of options. The options in the dropdown are:
 - Closed - Doesn't Require Review
 - Closed - Requires Review
 - Noted Concerns
 - On Hold
 - Revoke License
 - Suspend Admissions
 - Suspend License

Note: Only select the Foster Family options from the dropdown options, in this case you should be selecting either Closed – Doesn't Require Review, Closed – Requires Review, Noted Concerns, On Hold, or Suspend Admissions.

12. Click **Adverse Action Reason** dropdown, select the option.
13. Click **Completion Date** field, enter the *date*.
14. Click **Abridged Reason** field, enter the *reason*.
15. Click **Notes** field, enter the relevant *notes*.
16. The following are the fields that a user needs to complete in the **Approval History** section:
 17. Click **Assigned Worker** field, enter the *worker*. **Note:** The Assigned Worker field is mandatory.
 18. Click **Assigned Supervisor** field, enter the *supervisor* to update the field if necessary.

Note: The Assigned Worker and Assigned Supervisor is where you can enter Foster care Support Worker/Supervisor.

19. Click **Corrective Action Plan Needed?** dropdown, select the option. **Note:** Select Yes if the review identified issues that require a formal corrective action plan. Select No if no corrective action is needed based on the findings.
20. Click **Save**. A **New Provider Action** is created.

Task 2: Close Provider

1. Navigate to the Foster Family record Type by clicking on the **Provider Types** hyperlink in the **Related List Quick Links** section like the previous task. The **Provider Types** list displays.
2. Click the **Provider Type ID**. The selected Provider Types screen displays.
3. Click the **Provider Management Actions** hyperlink from the **Related List Quick Links** section. The **Provider Management Actions** list view displays.
4. Click on an existing **Adverse Action/Close Provider** record type. The **Provider Action** screen displays the **Details** tab.
5. Click the **Pencil** icon to edit/update the record.
6. Click the **Adverse Action Type** dropdown, on the **Information** section. Select the option from the list to close the Provider.

The options available are:

- Closed – Doesn't Require Review
- Closed – Requires Review
- Noted Concerns
- On Hold
- Revoke License
- Suspend Admissions
- Suspend License

Note: Only select the Foster Family options from the dropdown options, in this case you should be selecting either Closed – Doesn't Require Review, Closed – Requires Review, Noted Concerns, On Hold, or Suspend Admissions.

7. Click the **Adverse Action Reason** dropdown, select from the list of options. The options available in the dropdown are:
 - Adoption
 - Capacity
 - Compliance violations
 - Conflict with agency policies and expectations
 - CPS History
 - Criminal charges or conviction
 - Failure to meet minimum requirements for foster family or residence

- Failure to preserve the continuity and value of the child's racial, ethnic, and cultural identity
 - Family's circumstances have changed
 - Family's lifestyle not conducive to mental, ethical, and emotional development
 - Family can no longer be reached
 - Family feels disengaged from planning process
 - Family reports not feeling supported in their fostering journey
 - Family withdrew application
 - Financial hardship
 - Health concerns of the foster family
 - ICPC case ended
 - Inability to partner
 - Inappropriate discipline/behavior management
 - Kinship case ended
 - Lack of time or schedule conflicts
 - Moved out of state
 - Other
 - Personal or family reasons
 - Placement preferences unavailable
 - Retirement from fostering
 - Safety concerns
 - SIU investigation
 - Unable to complete training
8. Click **Notes** field, enter the *notes*.
 9. The following are the fields that you need to complete in the **Approval History** section:
 - Click **Assigned Worker** field, enter the *worker*. **Note:** The Assigned Worker field is Mandatory.
 - Click **Assigned Supervisor** field, enter the *supervisor* to update if needed.
 - Click **Corrective Action Plan Needed?** dropdown, select from the list of options.
 10. Click **Save** to proceed.

Knowledge Check!

Question 1: Which are the correct steps to create an adverse action for a specific provider type?

- A. Navigate to the Provider tab, click the Agreements hyperlink, and then click New.

- B. Navigate to the Homepage, select the Placement Inquiry tab, and click the Provider Management Actions hyperlink.
- C. Navigate to the Applications tab and click the Provider Management hyperlink.
- D. Navigate to the Provider Type, click the Provider Management Actions hyperlink, and then click New.

Module 9: Associated Related List

This Associated Related Lists module explains how to view and manage key Provider-related records that support oversight, compliance, and operational tracking in child welfare. You will learn how to access and interpret a Provider Corrective Action Plan which is a structured set of actions to address identified deficiencies and improve quality of care. You will also learn about Provider Appeals, when applicable, which are the formal process used in specific circumstances to dispute or request review of agency decisions. The module also covers how to review Intakes linked to a Provider, including situations where abuse is reported and the Provider is associated with the intake.

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

- View Associated Cases to access and review all relevant information.
- View Intake List
- Create Corrective Action Plans
- Create Provider Appeals

Lesson 1: Provider Related List Overview

As you are proceeding with the Geller Family case, Provider oversight is critical to ensure services are delivered safely, compliantly, and with clear accountability. In this lesson, you will first use Associated Cases to quickly locate and review all Provider-linked case activity relevant to the Geller Family. You will then review the Provider's Intake list to identify any reported concerns that could impact placement or service decisions. If gaps or deficiencies are identified, you will create a Corrective Action Plan to document required steps and track progress.

Learning Objectives:

- View Associated Cases Related Lists
- View Intake Related Lists
- Create Corrective Action Plans and Provider Appeals

Task 1: View Associated Cases Related List

1. Navigate to the desired Provider, click the **Associated Cases** hyperlink from the **Related List Quick Links** section. The **Associated Cases** list view displays the list of **Associated Cases** on the Provider including details of **Case ID, Case Type, Case Subtype, Assigned Worker, and Originating Case**.
2. Click the relevant **Case ID** hyperlink to view an existing record. The selected case screen displays.
3. Review the following sections in the **case** screen:
 - **Intake Review** - This section captures the details of new investigation, consolidating the initial intake information needed to understand and act on the report. It captures how the intake was received, identifies the individuals involved, documents the incident narrative, records the incident location/address, and includes practical directions for locating the child to support timely response and follow-up.
 - **Case Information** - This section captures the core case identifiers and status, the assignment and priority used to route and manage work, navigation links to quickly jump to related records in the workflow
 - **Case Summary** - This section provides a consolidated view of the investigation, supported by an AI-generated summary. It also displays the primary people associated to the case and a map-based view to quickly review relevant addresses such as the Provider and person locations.
 - **Attachments** - This section captures the list of attached documents and allows to download, upload, merge, and search for files.

Task 2: View Intake Related List

1. Navigate to the desired Provider, click the **Intakes** hyperlink from the **Related List Quick Links** section. The **Intakes** List View displays the list of Intakes on the Provider including details such as **Intake ID, Intake First Name, Intake Last Name, Status, Record Type, Report Date/Time, Intake Worker, and Disposition Supervisor**.
2. Click an existing **Intake ID** hyperlink to view. The selected Intake screen displays.
3. The **Basic Information** section of the Intake record captures general information regarding **Intake**.
4. The Attachment section displays the files available for the Intake.

Note: Refer to the Module 1, Lesson2: Document Management for more details.

Task 3: Creating Corrective Action Plans

1. Navigate to the desired Provider, click the **Corrective Action Plans** hyperlink from the **Related List Quick Links** section. The **Corrective Action Plans** screen displays.
2. Click **New**. The **New Corrective Action Plan** screen displays.
3. A Provider Corrective Action Plan is a structured approach to address and rectify the deficiencies or issues within a child welfare service Provider's operation.
4. The following are the fields a user needs to complete in the **Information** section:
 - Click **Program Area** dropdown, select *Foster Care Support*. The options in the dropdown are:
 - Foster Care Support
 - Licensing
 - PREA
 - Provider Quality
 - Technical Assistance
 - Other
 - Click **Corrective Action Plan Title** field, enter *Foster Care Support*.
 - Click **Corrective Action Plan Status** dropdown, select *Pending*. The options in the dropdown are:
 - Achieved

- Approved
 - Finalized
 - Not Achieved
 - Pending
 - Reassigned
 - Rejected
 - Submitted
 - Withdrawn
 - Click **Due Date** field, enter the *date*.
 - Click **Comments** field, enter the *comments* for the corrective action plan.
 - Click **Assigned Worker** field, enter *assigned worker*. **Note:** The Assigned Worker field is mandatory.
5. The following are the fields a user needs to complete in the **Approval Information** section:
- Click **Supervisor** field, enter *supervisor*.
6. Click **Save**. A new Corrective Action Plan has been created.

Task 4: Create Provider Appeals

1. Navigate to the desired Provider, click the **Appeals** hyperlink from the **Related List Quick Links** section. The **Appeals** screen displays details such as **Appeal ID**, **Appeal Type**, **Appeal Request Date**, and **Appeal Status**.
2. Click the hyperlink in the **Appeal ID** column to view an existing record.
3. Click **New** to create a new Appeals record. The **New Appeal: Provider Appeal** screen displays.
4. The following are the fields that a user needs to complete in the **Information** section:
 - Click **Appeal Status** dropdown, select from the available options. The options in the dropdown are:
 - Completed
 - Pending
 - Withdrawn
 - Click **Appeal Request Date** field, enter the *date*.
 - Click **Provider Person** field, enter the *Provider Person*.
 - Click **DCS Appeal Notes** field, enter the *notes*.
 - Click **Appeal Decision Outcome** dropdown, select from the available options. The options in the dropdown are:

- Denied
 - Granted
 - Withdrawn by Client
 - Withdrawn by DCS
 - Click **Appeal Decision Notes** field, enter *notes*.
 - Click **Appeal Type** dropdown, select from the available options. **Note:** Select the *Foster Home* related option and not the CFTM option.
 - Click **Provider Appeal Notes** field, enter the *appeal notes*.
 - Click **Abridge Reason** dropdown, select from the available options. The options in the dropdown are:
 - Administratively Discontinued
 - Erroneous Report
 - Family Already Active with FAIR (Family Actively Improving Relationships)
 - No Legal Recourse
 - Other
 - Click **Abridge Notes** field, enter the *notes*.
 - Click **Appeal Decision Date** field, enter the *date*.
5. Click **Save**. A New Appeal is created successfully.

Knowledge Check!

Question 1: Which of the following sections is described as consolidating initial intake details and incident narrative?

- A. Case Summary
- B. System Information
- C. Intake Review
- D. Intake Summary

Question 2: Associated Cases are mainly used to

- A. Quickly locate and review provider-linked case activity
- B. File a provider appeal
- C. Upload documents
- D. Create a master service rate

Question 3: A Provider Corrective Action Plan is best described as

- A. A portal login credential reset
- B. A list of invoices paid
- C. A placement referral decision record
- D. A structured approach to address and rectify deficiencies/issues

Question 4: Which of the following is a default option in the Appeal Status dropdown?

- A. Completed
- B. Withdrawn
- C. Pending
- D. Approved

Module 10: Provider Portal

In this module, you will gain practical, end-to-end awareness of the Provider Portal and how foster parents, as Providers, use it to manage important activities and information in one place. This module is included in the curriculum to help DCS staff understand how foster parents (external providers) access and use the Provider Portal. You will walk through the Portal experience from the Provider perspective, including requesting access, setting up an account, and navigating the homepage.

The module also explains how foster parents use Provider Portal to review and maintain their profile, track and complete tasks, and submit updates. In addition, you will learn how a foster parent (external provider), submits a change request and files an incident report through the Provider Portal. The module also covers how they access financial and administrative information, including invoices and payments, services, and licenses.

Finally, you will learn how foster parents use Provider Portal to submit applications and manage placement-related information. This includes viewing placements and placement referrals, as well as reviewing details for children placed in their care, such as health information, medications, allergies, diagnoses, insurance, education, and appointments. Understanding this workflow will help DCS staff support accurate, timely, and coordinated care.

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

- Request access and activate your Provider Portal account.
- Navigate the homepage and manage your profile information.
- View and manage tasks, including submitting Change Requests and Incident Reports.
- Review invoices and payment details and access services and license information.
- Submit applications and view placements/placement referrals.
- Access placed child information, including health/medications, allergies/diagnoses/insurance, and education/appointments.

Lesson 1: Portal Enrollment and Account Setup

This lesson covers how a foster parent, in their role as an external Provider, enrolls in the Provider Portal, requests access, and completes account setup so DCS staff can understand the Provider's experience from the start.

Learning Objectives:

- Request access to the Provider Portal
- Set up and activate an account

Task 1: Requesting Access to the Provider Portal

1. Click the **Register** button, on the main page of the portal. The registration screen displays.
2. Click **Requested Profile Type** dropdown, select **Individual**. The options in the dropdown are:
 - Individual
 - Organization
3. Click **First Name** field, enter the *first name####*.
4. Click **Last Name** field, enter the *last name####*.
5. Click **Phone** field, enter the *number*.
6. Click **Mailing Address** field, enter the *address*.
7. Click **Email Address** field, enter the *email address*.
8. Click **Last 4 Digits of SSN** field, enter the SSN number.
9. Click **Register**. The **Verify that you are human** screen displays.
10. Click the check box for I'm not a robot verification.
11. Select the appropriate images for verification and click *Verify*.
12. The registration request has been submitted successfully.
13. Update status to **Completed** from the provider inquiry

Task 2: Setting up and Activating a User Account

1. Search for the email with the subject as **Your TN DCS Provider Portal Registration Request is Approved** in your registered email inbox.
2. Click on the email. The email screen displays.
Note: This happens only after your Inquiry is completed and you are authorized to access the portal.
3. Review the details on the email and click the **account creation page** hyperlink. The **Set-up Security Question** screen displays.

4. Click the **Question** dropdown, select the appropriate question.
The options in the dropdown are:
 - What is your mother's maiden name?
 - What was the name of your first pet?
 - What was the name of your elementary school?
 - In what city were you born?
 - What is your father's middle name?
 - What is the name of your favorite childhood friend?
 - What was your childhood nickname?
 - What street did you grow up on?
 - What is the name of your favorite teacher?
 - What was the name of your first employer?
 - What was your favorite place to visit as a child?
 - What is the name of your first school?
5. Click the **Answer** field, enter the *answer*.
6. Click **Continue**. The **Set up Your Account Password** screen displays.
7. Click **Create Password** field, enter a new *password*.
8. Click **Confirm Password** field, enter the *password* again.
9. Click **Create Account**. The account has been created successfully.
10. The **Welcome to Tennessee's Department of Children's Services Provider Portal** screen displays.
11. Click the **Username** field, enter the registered *email address*.
12. Click the **Password** field, enter the *password* and click **Login**.
13. The **Welcome XXXX** screen displays.

Lesson 2: Homepage and Profile Navigation

This lesson covers how a foster parent, in their role as an external Provider, navigates the Provider Portal homepage and profile features to review information, access key functions, and manage their account details.

Learning Objectives:

- Navigate the Homepage
- View profile information

Task 1: Navigating the Homepage

1. Log in using the **Provider Portal** credentials. The **homepage** displays. **Note:** Once you log into the Provider Portal, the landing page will show your first name, last name and organization name.
2. The **Home** tab has the following sections:
 - **Placements:** This widget displays the recently created placements. Click the **View All Placements** hyperlink, to view all the placements.
 - **Upcoming Tasks:** This widget displays a subset of the provider's outstanding tasks. It will list the five tasks that have a due date that is equal to today's date or closest to today's date. Click the **View All Tasks** hyperlink to view all the outstanding tasks.
 - **Invoices:** This widget displays the recently created invoices. Click the **View All Invoices** hyperlink, to view all the invoices.
 - **Requests:** This widget displays the recently created support requests. Click the **View All Requests** hyperlink, to view all the requests.
3. Click on the **Profile** icon on the far right to review your profile information.



System Tip!

There is a search icon on Placement, Invoices, and Requests widget that will enable you to search related records.

Task 2: Viewing Profile Information

1. Click the **My Profile** icon on the top right-hand corner of the screen and click on **Profile**.
2. The **My Profile** screen displays. Review the following details in the **Account Details** section:
 - **Username** – This captures the Provider's username on the Provider Portal.
 - **Provider ID** – This captures the system generated unique ID for the Provider.

- **Phone** – This captures the phone number of the Provider.
 - **Email Address** – This captures the email address of the Provider.
 - **First Name** – This captures the first name of the Provider.
 - **Last Name** – This captures the last name of the Provider.
 - **Provider Organization Name** – This captures the organization name of the Provider.
 - **Direct Provider Organization** – This captures the Direct Provider of the Organization, if applicable.
 - **Edison ID** – This captures the Edison ID of the Provider.
3. Review the following details in the **Addresses** section:
- **Address ID** – This captures the system generated unique ID of the Provider address record.
 - **Type** – This captures the type of address.
 - **Status** – This captures the status of the address.
 - **Start Date** – This captures the start date of the address.
 - **End Date** – This captures the end date of the address, if applicable.
 - **Street** – This captures the street details.
 - **City** – This captures the city details.
 - **State** – This captures the state details.
4. Review the following details in the **Provider Types** section:
- **Provider Type ID** – This captures the system generated unique ID of the Provider type record.
 - **Provider Type** – This captures the type of Provider.
 - **Status** – This captures the status of the assigned Provider type.
 - **Date Effective** – This captures the date on which the provider type was assigned to the Provider.
 - **Date Ended** – This captures the date on which the Provider type was closed, if applicable.
 - **Application** – This captures the system generated unique ID of the provider application associated with the assignment of the Provider type.

- **Assigned DCS Worker** – This captures the name of the DCS worker who is assigned to the Provider record. **Note:** Foster Care Support Worker can be added here.
 - **Assigned DCS Supervisor** – This captures the name of the DCS supervisor who is assigned to the Provider record. **Note:** Foster Care Support Supervisor can be added here.
5. Review the following details in the **DCS Contacts** section:
- **Provider Type** – This captures the Provider type to which the DCS Staff member is assigned to.
 - **DCS Staff Type** – This captures whether the assigned DCS staff is a DCS worker or a DCS supervisor. **Note:** For this step, Foster Care Support Worker can be mentioned.
 - **Name** – This captures the name of the DCS Staff member.
 - **Email** – This captures the email address of the DCS staff member.
 - **Phone** – This captures the phone number of the DCS staff member.

Lesson 3: Managing Tasks and Submissions

This lesson covers how a foster parent, in their role as an external Provider, uses the Provider Portal to review and complete tasks, submit required information, and track updates related to their Provider record.

Learning Objectives:

- View and track assigned tasks
- Submit a Support Request

Task 1: Viewing and Tracking Assigned Tasks

The Provider Portal My Tasks page provides information about the tasks assigned to the provider. The tasks list contains only tasks that can be completed via the portal so that they can be automatically marked as complete. Examples of tasks can be New Service Request, New Placement Referral, etc.

1. Click **My Tasks** tab from the homepage. The **My Tasks** screen displays.

2. This screen displays all the tasks that are assigned to the Provider.
3. Review the following in the **My Tasks** screen:
 - **Task ID** – This captures the system generated unique ID for the task.
 - **Task Title** – This captures the title of the task.
 - **Task Description** – This captures the description of the task.
 - **Due Date/ Completion Date** – This captures the due date of the task.
 - **Related Item** – This captures the system generated unique ID of the item to which the task is related to. Click this hyperlink to navigate to each of the tasks.
 - **Task Status** – This captures the status of the task.

Task 2: Submitting a Support Request

1. Click the **Support** tab from the homepage. The **Support Requests** screen displays.
2. Click **New Request**. The **New Support Request** screen displays.
3. Click the **Request Type** dropdown, select the relevant request type. The options in the dropdown are:
 - Add New Person to Home/Organization
 - Address Change
 - Capacity (Congregate Care Facility)
 - Changes Impacting Eligibility Status
 - Clearance Request
 - Contact By Subsidy Specialist
 - Contact Information Change
 - Other
 - Placement Change
 - Placement Hold
 - Rate Decrease Due to Change in Child's Level of Care
 - Rate Increase Due to Age
 - Rate Increase Due to Increase in Child's Level of Care
 - Respite
 - Termination of Subsidy
 - Update Environment
 - Update Persons in Household

- Update Pets
 - Update to Direct Deposit Information
 - Update Vehicle Information
 - Verification of Subsidy Payment
5. Click the **Subject** field, enter the *subject*.
 6. The Request Date field is auto populated.
 7. Click **Select your file to upload**. The Upload File pop-up displays.
 8. Click the **Document Date** field, enter the *date*.
 9. Click the **Document Name** field, enter the *document name*.
 10. Click **Upload Files**, upload the appropriate document.
 11. Click the **Comments** field, enter the appropriate comments and click **Save**.
 12. Navigate to the **New Support Request** screen.
 13. Click the **Comments** field, enter the appropriate comments.
 14. Click **Submit**. The new change request is submitted successfully.

Lesson 4: Invoices, Payments and Services

This lesson covers how a foster parent, in their role as an external Provider, uses the Provider Portal to view invoices and payments, review service-related information, and access key financial and administrative details.

Learning Objectives:

- View invoice and payment details
- Review services and view licenses, and related information

Task 1: Viewing Invoices and Payment Details

1. Click the **Associated Items** tab from the homepage. The **Associated Items** screen displays.
2. Click the **Invoices** tab. The **Invoices** pop-up displays.
3. Review the following in the Invoices pop-up:
 - **Invoice ID** – This captures the system generated invoice ID.
 - **Invoice Date** – This captures the date of invoice creation.
 - **Invoice Type** – This captures the type of invoice record.

- **Period Start Date** – This captures the start date of the month for which this invoice applies.
 - **Period End Date** – This captures the end date of the month for which this invoice applies.
 - **Provider Agreement** – This captures the Provider agreement this Invoice is for. **Note:** This explains the rules and terms for a provider to offer services and receive payment.
 - **Invoice Status** – This captures the status of the invoice record.
 - **Invoice Amount** – This captures the invoice amount.
 - **Payment Date** – This captures the date the invoice was paid.
4. Click the hyperlink under the **Invoice ID**. The selected Invoice screen displays.
 5. Review the details.

Task 2: Review Services

1. Click the **Associated Items** tab from the homepage. The **Associated Items** screen displays.
2. Click the **Services** tab. The **Services** pop-up displays.
Note: Examples of services can include add Persons to the household, update address, etc.
3. Review the following in the **Services** pop-up:
 - **Service Referral ID** – This captures the system generated ID of the service referral record.
 - **Case ID** – This captures the ID of the case the service referral relates to.
 - **Case Name** – This captures the name of the case.
 - **Referral Date** – This captures the date of referral.
 - **Requested Start Date** – This captures the date DCS is requesting the service to begin.
 - **Service Type** – This captures the high-level service.
 - **Service Units/Hour** – This captures the service units/hour
 - **Program** – This captures the program that is associated with the service request.
 - **Referral Status** – This captures the status of the service request.

4. Click the hyperlink under the **Service Referral ID**. The selected service screen displays.

Task 3: Viewing Licenses and related information

1. Click the **Associated Items** tab from the homepage. The **Associated Items** screen displays.
2. Click the **Licenses** tab. The **Licenses** pop-up displays.
3. Review the following in the Licenses pop-up:
 - **License Number** – This captures the license number for the Provider.
 - **License Category** – This captures the license category.
 - **Date Effective** – This captures the date effective.
 - **Expiration Date** – This captures the expiration date.
 - **Type** – This captures the type of license.
 - **Provider** – This captures the Provider to whom the license has been issued.
 - **State** – This captures the state of issued license.
 - **License Agency** – This captures the license agency.
 - **Status** – This captures the status of the license.
4. Click the hyperlink under the **License ID**. The selected **License** screen displays.
5. Review the details.

Lesson 5: Applications and Placements

This lesson covers how a foster parent, in their role as an external Provider, uses the Provider Portal to submit Foster Home applications, manage placement-related information, review placement referrals, and view details for children placed in their care.

Learning Objectives:

- Submit application through the portal
- View placement and referrals

Task 1: Submitting Applications through the Portal

1. Click the **My Applications** tab from the homepage. The **My Applications** screen displays.
2. Review the following in the My Applications screen:
 - **Application Number**

- **Application Type**
 - **Provider Type**
 - **Submission Date**
 - **Application Status**
3. Click **Start New Application** to create a new application. The **Get Started with Your Provider Application** pop-up displays.
Note: A Provider account can have multiple Applications submitted.
 4. Select the **Foster Family** radio button. The **Description and Documents** information displays.
Note: The other options available are *Licensing Application*, *Placement Provider Application* and *Vendor Application*.
 5. Click **Continue** to proceed. The **New Foster Family Application** screen displays.
 6. Review the **Contact Information** section.
 7. Review the **General Information** section.
 8. If needed, click the **+ Add Co-Applicant/Caretaker** button at the bottom of the screen to add a co-applicant/caretaker, otherwise click **Save & Next**. The **People** section displays.
Note: You will have the opportunity to add multiple children and other adults residing in the home.
 9. Review the **Children** section under the **People** section:
 10. Review the **Other Adults in the Home** section under the **People** section:



Process Tip!

For the Foster Family Application, a minimum of three non-relative references is required.

11. Click **Save & Next**. Review the **Preferences** screen.
12. Click **Save & Next**. Review the **History & Experience** screen.
13. Review the **Previous History with Law Enforcement** section.
14. Click **Save & Next**. Review the **Attachments** screen.
15. Click **Save & Next**. Review the **Review & Submit** screen displays.
16. Review the **Signature(s)** section.
17. Click **Save and Submit**. The Application is created and submitted successfully.

Task 2: Viewing Placements and Placement Referrals

A placement referral is received in the portal and routed to an external Provider (Foster Parent) for review. If the Provider accepts the referral, DCS then reviews and approves it in C-FIRST!. Once approved, the Provider is notified, and a placement record is automatically created in the portal with the child's details. To view Placement Referrals and Placements as an external Provider, follow the steps below:

View Placement Referrals:

1. Click the **Associated Items** tab, from the homepage. The **Associated Items** screen displays.
2. Click the **Placements** tab. The **Placements** pop-up displays.
3. Scroll to the **Placement Referrals** tab and review the following:
 - **Provider Contact ID** – This displays the system generated ID for the Provider contact.
 - **Requested Placement Type** – This displays the requested placement type.
 - **Needed Start Date** – This displays the needed start date of the placement.
 - **Needed End Date** – This displays the needed end date of the placement.
 - **Status** – This displays the status of the referral on the Provider portal.
 - **Response Due Date** – This displays the due date of the referral response.
 - **Provider Response** – This displays the Provider response.
4. Click the relevant Provider Contact ID hyperlink. The selected **Placement Referral** screen displays.
5. Review the following in the **Overview** section:
 - **Referral ID** – This displays the system generated unique placement referral ID.
 - **Referral Date** – This displays the date when the referral was made.
 - **Child Name** – This displays the name of the primary child to be placed.

- **Requested Placement Type** – This displays the requested placement type.
 - **Needed Start Date** – This displays the start date of the placement request.
 - **Placement Status** – This displays the status of the placement referral.
 - **Referral Response Due Date** – This displays the date when the response is requested from the Provider.
 - **Number of Children Being Placed** – This displays the number of children being placed.
 - **Placement Needed For** – This displays whether the placement is needed only for child or sibling group or teen Parent and child.
 - **Needed End Date** – This displays the end date of the placement request.
6. Scroll down to the **Provider Response** section and review the following:
- **Provider Response** – This displays the details of the Provider's response.
 - **Waitlist Response Details** – This displays the details of the waitlisting response.
 - **Critical Contract Scope Reason** – This displays the details of the critical contract scope reason.
 - **Further Contract Explanation** – This displays the details of the Provider's contract scope.
 - **Response Date** – This displays the date of the response.
 - **Out of Scope Reason** – This displays the details of the outside of scope reason.
 - **Behavioral Contract Scope Reason** – This displays the details of the behavioral contract scope reason.

View Placements:

1. Click the **Associated Items** tab, from the homepage. The **Associated Items** screen displays.
2. Click the **Placements** tab. The **Placements** pop-up displays.
3. Review the following in the **Placements** pop-up:
 - **Placement ID** – This displays the system generated unique ID for placement.

- **Child** – This displays the primary name of the child placed.
 - **Placement Type** – This displays the type of placement.
 - **Service** – captures the services provided for the placement.
 - **Placement Status** – This displays the status of the placement.
 - **Start Date** – This displays the start date of the placement.
 - **End Date** – This displays the end date of the placement.
4. Click the relevant **Placement ID** hyperlink. The selected Placement screen displays.
 5. Review the following in the **Overview** section:
 - **Placement ID** – This displays the system generated unique placement ID.
 - **Referral ID** – This displays the system generated unique ID for the referral related to the placement.
 - **Placement status** – This displays the placement status in the list view.
 - **Provider/Organization Name** – This displays the Provider/Organization name.
 - **Case Person ID**
 - **Name**
 - **Start Date** – This displays the start date of the placement.
 - **Expected End Date** – This displays the expected end date of the placement.
 - **Placement End Reason** – This displays the end reason of the placement.
 - **Placement End Date** – This displays the end date of the placement.

Lesson 6: Reviewing and Accessing Placed Child Information

This lesson covers how a foster parent, in their role as an external Provider, uses the Provider Portal to review and access information for children placed in their care, including health, medications, allergies, diagnoses, insurance, education, and appointments.

Learning Objectives:

- View Child Health and Medication details
- Review Child Allergies, Diagnoses, and Information details
- Review Education and Appointment information

Task 1: Viewing Child Health and Medication details

1. Click the **Associated Items** tab, from the homepage. The **Associated Items** screen displays.
2. Click the **Placements** tab. The **Placements** pop-up displays.
3. Scroll down to the Placements table.
4. Click the relevant Provider Contact ID. The selected **Placement** screen displays.
5. Click the **Health** tab, from the **Child Information** section.
6. Review the following:
 - **Medication Name** – This captures the name of the medication that the client has prescribed.
 - **Status** – This captures the status of the medication.
 - **Prescriber/Provider's Name** – This captures the prescriber's name.
 - **Strength of Dosage** – This captures the strength of the medication.
 - **Medication Frequency** – This captures the frequency of the medication.
 - **Start Date** – This captures the date that the person had started taking the medication.
 - **End Date** – This captures the date that the person has stopped taking the medication.

Task 2: Reviewing Allergies, Diagnoses and Insurance Information

1. Click the **Associated Items** tab, from the homepage. The **Associated Items** screen displays.
2. Click the **Placements** tab. The **Placements** pop-up displays.
3. Scroll down to the Placements table.
4. Click the relevant Provider Contact ID. The selected Placement screen displays.
5. Click the **Health** tab, from the **Child Information** section.
6. Scroll down to the Allergies tab and review the following:
 - **Allergy Type** – This captures the type of allergy.

- **Allergy** – This captures the name of the allergy.
 - **Allergic Reaction(s)** – This captures the allergic reaction.
 - **Date Entered** – This captures the date when the record is created.
 - **End Date** – This captures the end date of the allergy.
7. Scroll down to the **Diagnoses** tab and review the following:
- **Diagnosis** – This captures the diagnosis for the client.
 - **Diagnosis Status** – This captures the field to track the overall status of the record.
 - **Health Care Provider** – This captures the health care Provider details.
 - **Diagnosis Date** – This captures the diagnosis date for the client.
 - **End Date** – This captures the end date of the diagnosis.
8. Click the **Insurance** tab, from the **Child Information** section.
9. Review the following:
- **Type** – This captures the type of private insurance.
 - **Effective Date** – This captures the effective date of the insurance.
 - **End Date** – This captures the end date of the insurance.
 - **Insurance Company Name** – This captures the name of the insurance company.
 - **Policy Status** – This captures the policy status.
 - **Policy Number** – This captures the policy number.

Task 3: Accessing Education Details and Appointment Information

1. Click the **Education** tab, from the **Child Information** section.
2. Review the following:
 - **School Name** – This captures the name of the school.
 - **Grade** – This captures the current grade.
 - **Education Status** – This captures the current status of the child's educational enrollment.
 - **Active IEP** – This captures whether the child has an IEP in place.
 - **Education Type** – This captures the education type.
3. Click the **Upcoming Appointments** tab, from the **Child Information** section.

4. Review the following:

- **Appointment Type** – This captures the type of appointment.
- **Date/Time** – This captures the date and time of the appointment.
- **Appointment** – This captures the medical appointment.
- **Provider** – This captures the name of the healthcare Provider.
- **Address** – This captures the address of the medical appointment.
- **Status** – This captures the appointment status.
- **Phone** – This captures the contact number.

Knowledge Check!

Question 1: What email subject should you look for to begin portal setup?

- A. Your Provider Portal Registration Request is Pending
- B. Welcome to C-FIRST!
- C. Your TN DCS Provider Portal Registration Request is Approved
- D. Provider Portal: Password Reset Requested

Question 2: While updating the profile information in the Provider Types section, what does Date Effective represent?

- A. Date provider type was assigned to the provider
- B. Date the invoice was paid
- C. Date the appeal was created
- D. Date the intake narrative was finalized

Question 3: After selecting a Provider Contact ID from Placements, which tab is used to review medication details?

- A. Timeline
- B. Insurance
- C. Health
- D. Education

Question 4: Which of the following is listed as a field under the Insurance information section?

- A. Action ID
- B. Most Recent Approver
- C. Provider Category
- D. Policy Number

Module 11: Supervisor Functions

As Foster Home Provider activities move from application intake to approval and ongoing monitoring, supervisors need a clear, reliable way to prioritize work, confirm compliance, and keep Provider decisions moving without sacrificing quality. C-FIRST! supports this by surfacing the right information at the right time through a role-tailored Supervisor dashboard, helping you quickly identify what requires review, what is waiting on approval, and what may pose risk or delay.

This module walks you through the day-to-day actions a supervisor takes to keep a Foster Family Application on track. You will start by learning how to navigate and manage the Supervisor dashboard using widgets and queues to locate outstanding items, monitor progress across Provider activities, and spot time-sensitive tasks that need immediate attention. From there, you will practice how to review documentation for quality and compliance, focusing on whether required components are present, complete, and consistent. Finally, you will complete the end-to-end workflow for approving key Foster Family Application components, ensuring the application package is ready to advance and that approvals are properly recorded. This section also includes steps on accessing, running, and filtering reports which can be accessed by all users to quickly find the insights needed to guide decisions and support consistent outcomes.

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

- Navigate and manage the Supervisor dashboard
- Approve key Foster Family Application Components

Lesson 1: Approve Key Foster Family Application Components

In the Geller Family scenario, the Foster Family Application is nearing the point where it can advance, but it requires supervisor review and approval of several key components to ensure the Provider record is complete, compliant, and ready for placement consideration. In this lesson, you will follow Geller family's application from pending approval to approved, using C-FIRST! to locate approval items, confirm required documentation is present and consistent, and record your approval decisions. You will also learn how to navigate to the

submitted record when the worker submits completed Provider Management Actions for review by selecting Submit for Approval on the Provider Management Action screen. After which you, as the supervisor, will log in to approve, reject, or reassign the request. By the end of the lesson, you will be able to confidently review and approve the Geller Family's key Foster Family Application components, ensuring the application package meets quality and compliance expectations and is ready for the next step in the Provider process.

This lesson covers approving Foster Family Applications.

Learning Objectives:

- Manage workloads
- Approve Items from the Items to Approve list
- Reassigning Records to other workers

Task 1: Manage Team Workloads

1. Log in as the **Supervisor** and click **Home** tab to navigate to the supervisor dashboard.
2. Click the **Items to Approve** on the dashboard. This widget provides a list of items assigned under your scope.
3. Click the **Record ID** hyperlink to navigate to the approval record. **Note:** The type of record and the user who submitted the record are mentioned below the **Record ID** hyperlink.



Process Tip!

An approval record and task are created by the system and assigned to the first approver, which is automatically set to be the Assigned Supervisor of the Provider Type.

Task 2: Approve an Item from the Items to Approve Widget

When a Provider Management Action is submitted for approval, the approval record gets created and an associated task is assigned to the Supervisor for the Provider Type. As a supervisor, you will be able to view the Items to Approve list on the dashboard.

1. Log in as the Supervisor, on the Homepage, click the Item to Approve hyperlink in the **Items to Approve** widget. The Approval Request screen displays.

2. Review the approval information, then select *Approve* from the options available. This displays the **Approve** screen with a text box for comments. **Note:** The other options available are *Reject* and *Reassign*.
3. Click **Approve**. C-FIRST! approves the selected record and removes it from the **Items to Approve** widget.

Task 3: Reassign Record to Another User

1. Open the task from the **Notifications** that has been assigned to you.
2. Click the **Record ID** hyperlink to open the approval request in another screen with **Approval Details**. **Note:** You will be able to view the **Submitted Comments** on the left side of the screen.
3. Click **Reassign** if the assigned approver of the record is not the person who needs to perform the approval. The **Reassign Approval Request** pop-up displays.
4. Click the **Reassign To** field, enter the *new user's name*.
5. Click the **Comments** field, enter the required *notes*.
6. Click **Reassign** to complete the reassigning process.

Lesson 2: Access Tableau

All workers and supervisors have access to certain reports within Tableau. The Tableau Homepage has list of reports with the respective categories and links to access them.

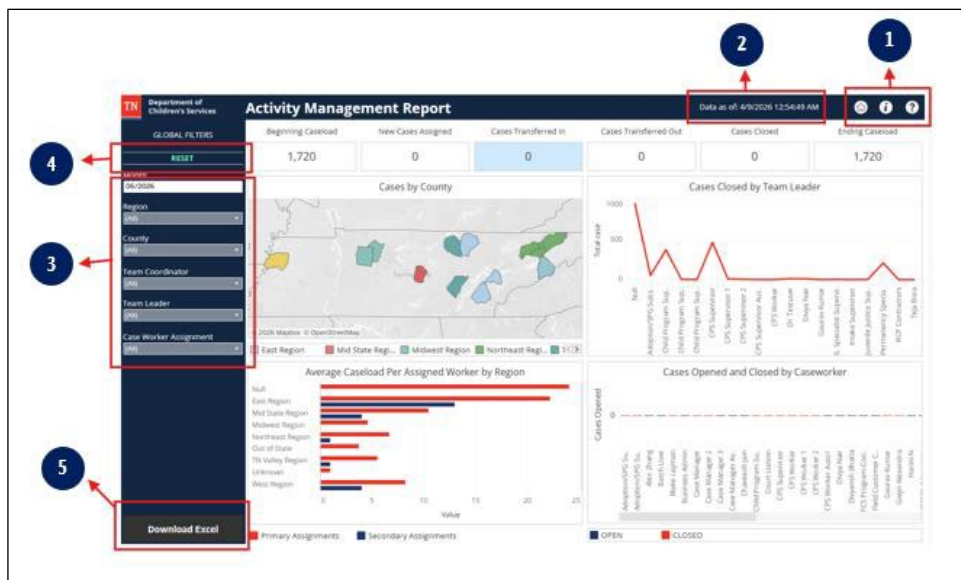


Tableau Homepage

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 will highlight Filtering and Downloading in our next two tasks.

Learning Objectives

- Accessing Tableau Reports
- Filtering Reports
- Downloading Reports

Task 1: Accessing Tableau Reports

Tableau will be accessible from your Homepage. It is highly recommended to access C-FIRST! using the Google Chrome browser.

Note: To access Tableau, you need to be either on the state network or be connected to the VPN.

1. To log in to Tableau, enter your Username and Password which would be the same as your state login credentials.
2. The **Home** screen of the main C-FIRST! Reports Home Page lists all report 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 a ribbon as well as a Mail to link to contact Tableau admin for any issues.
 - The **Filter** option filters out reports by the respective categories.
 - The **Link** beside each report navigates you to that specific report.

Report Category	Serial Num.	Report Category	Report Name	Report Description	Report Link
(All)	1	Regional Operations	Non-Custody Open Case Age	The Non-Custody Open/Case Age report is designed to provide a comprehen...	Link
☒ Case Analysis	2	Regional Operations	Administrative Review Consultation	The Administrative Review/Consultation report is designed to track time...	Link
☒ Case Analysis (CP)	3	Regional Operations	Resource Linkage Time Open	The Resource Linkage Time Open report is designed to assess the numb...	Link
☒ Case Analysis (OCS)	4	Regional Operations	Case Load Report	The Case Load report is designed to monitor and track caseload and metr...	Link
☒ Data Quality	5	Statewide Services	OTFM Report	The Child and Family Team Meeting (CFTM) report is designed to monitor...	Link
☒ Fiscal	6	Regional Operations	Activity Management	The Activity Management report is designed to capture detailed caps, a...	Link
☒ Health & Education	7	Regional Operations	Diversion Report	The Diversion report is a comprehensive tool designed to capture and m...	Link
☒ ICPC	8	Legal	Legal Status Report	The Legal Status report is designed to list all legal petitions within the sy...	Link
☒ Independent Living	9	Regional Operations	PSS/FCIP Time Open	The PSS/FCIP Time Open report is designed to track the timeliness of Fa...	Link
☒ Juvenile Justice	10	Regional Operations	Diligent Search Report	The Diligent Search report is designed to capture and track the diligent s...	Link
☒ Legal	11	Regional Operations	Parent Child Visit Summary and Detail Report	The Parent Child Visit Summary and Detail report is designed to capture...	Link
☒ Placement	12	Statewide Services	Date Needed NDA (Notice of Action)	The Date Needed NDA (Notice of Action) Report is designed to provide a...	Link
☒ Quality Compliance	13	ICPC	ICPC Referral Date Submission Timeliness Report	The ICPC Progress report is designed to monitor the progress of ICPC pla...	Link
☒ Regional Operations	14	Statewide Services	Foster Home Mega	The Foster Home Mega report is essential for federal reporting and outli...	Link
☒ Statewide Services	15	Statewide Services	Foster Home Visit	The Foster Home Visit report is used to monitor that face-to-face contact...	Link
	16	Statewide Services	Relative Caregiver Program Detail	The Relative Caregiver Program Detail report is designed to track and m...	Link
	17	Data Quality	Data Inconsistency	The Data Inconsistency report is designed to identify, monitor, and resol...	Link
	18	Independent Living	Credit Check	The Credit Check report is designed to track the status of credit checks f...	Link
	19	Regional Operations	Collateral Contacts Report	The Collateral Contacts report is designed to monitor and track all child...	Link
	20	Regional Operations	Entry and Exit Custody (Exit) Report	The Entry and Exit Custody (Exit) report is designed to track and monito...	Link
	21	Regional Operations	Trial Home Visit Report	The Trial Home Visit report is designed to monitor and track all the youth...	Link
	22	Juvenile Justice	Wilder Monthly RCM Contacts Report	The Wilder Monthly RCM Contacts report is designed to track all the youth...	Link
	23	Regional Operations	Runaway Report	The Runaway report is designed to track and monitor youth who are and...	Link
	24	Regional Operations	Monthly Detention Report	The Monthly Detention report is designed to monitor and track all the yo...	Link
	25	Regional Operations	Recidivism Repeat Cases	The Recidivism/Repeat Cases report is designed to provide a comprehen...	Link
	26	Regional Operations	Safety PASST Report	The Safety PASST report is designed to track the submission and approval...	Link
	27	Regional Operations	Timely Case Recordings Report	The Timely Case Recordings report is designed to capture the timely entr...	Link
	28	Regional Operations	Override Decision Report	The Override Decision report is designed to track overrides made on inta...	Link
	29	Placement	Active Placement List	The Active Placement List report is designed to provide a detailed view o...	Link
	30	Placement	Placement Stability Report	The Placement stability report is designed to track the stability of place...	Link
	31	Placement	Timeliness of Placement Change Reporting	The Timeliness of Placement Change Reporting report is designed to trac...	Link
	32	Placement	Waiting List Report	The Waiting List report is designed to monitor children on the waiting lis...	Link
	33	Placement	Current Census Availability	The Current Census/Availability report is designed to provide a detailed...	Link

Note: To log out of Tableau, click the **Profile** icon in the upper-right corner and select the **Sign Out** link located with the **Profile** 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.

GLOBAL FILTERS		Intake Report						Data as of: 5/5/2026 2:04:53 PM	
RESET		Region	Supervisor	Initial Intake Worker	Intake Worker Disposition Track	Intake Worker Disposition Priority	County	ZIP Code	
Start Date	End Date								
06/02/2025	06/02/2026								
Region									
Midwest Region									
(All)									
Null									
East Region									
Mid State Region									
Northwest Region									
Out of State									
TN Valley Region									
Unknown									
West Region									
Download Excel									
		Midwest Region	Null	Intake Supervisor	Null	Null	Blount	Null	
		Midwest Region	Null	Ns2 Testuser	Null	Null	Anderson	38464	
		Midwest Region	Child Program Super	Gaurav Kumar	Null	Null	Dickson	38012	
		Midwest Region	CPS Supervisor	Intake Supervisor	Null	Null	Bedford	Null	
		Midwest Region	CPS Supervisor	Intake Supervisor	Null	Null	Blount	Null	
		Midwest Region	Cps Supervisor	Gaurav Kumar	Null	Null	Carroll	99999	
		Midwest Region	Cps Supervisor	Gaurav Kumar	Null	Null	Chester	Null	
		Midwest Region	Cps Supervisor	Intake Supervisor	Null	Null	Benton	Null	
		Midwest Region	Cps Supervisor	Intake Supervisor	Null	Null	Benton	Null	
		Midwest Region	Cps Supervisor	Intake Supervisor	Null	Null	Chester	38464	
		Midwest Region	Cps Supervisor	Intake Supervisor	OUT OF STATE COURTESY	Null	Benton	Null	
		Midwest Region	Cps Supervisor	Intake Supervisor	SIU INVESTIGATION	Null	Carroll	Null	
		Midwest Region	Cps Supervisor	Ns1 Testuser	Null	Null	Benton	Null	
		Midwest Region	Cps Supervisor	Ns1 Testuser	Null	Null	Benton	38464	
		Midwest Region	Cps Supervisor	Ns1 Testuser	Null	Null	Benton	38464	
		Midwest Region	Cps Supervisor	Ns1 Testuser	Null	Null	Benton	96543	
		Midwest Region	Cps Supervisor	Ns1 Testuser	Null	Null	Cheatham	38464	
		Midwest Region	Cps Supervisor	Ns1 Testuser	Null	PRIORITY 1	Carroll	38464	
		Midwest Region	Cps Supervisor	Ns1 Testuser	OUT OF STATE COURTESY	Null	Decatur	38464	
		Midwest Region	Cps Supervisor	Ns2 Testuser	Null	Null	Benton	Null	
		Midwest Region	Cps Supervisor	Ns2 Testuser	Null	Null	Benton	Null	
		Midwest Region	Cps Supervisor	Ns2 Testuser	Null	Null	Chester	Null	
		Midwest Region	Cps Supervisor 1	Intake Supervisor 1	Null	Null	Benton	Null	
		Midwest Region	Cps Supervisor 2	Intake Supervisor 1	Null	Null	Cheatham	Null	
		Midwest Region	Cps Supervisor 3	Intake Supervisor 1	Null	Null	Chester	Null	

- 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.

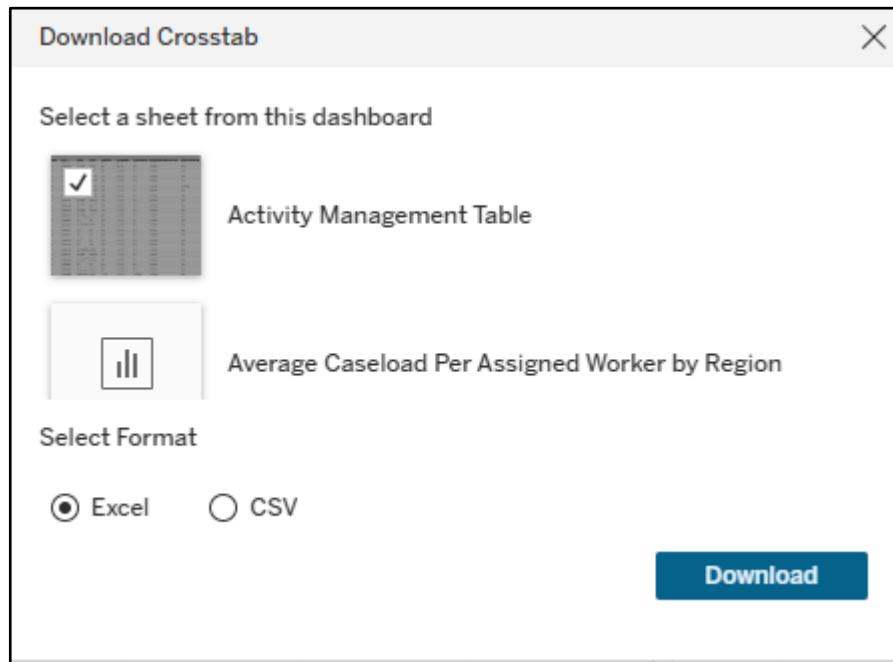
GLOBAL FILTERS		Intake Report						Data as of: 5/5/2026 2:04:53 PM	
RESET		Region	Supervisor	Initial Intake Worker	Intake Worker Disposition Track	Intake Worker Disposition Priority	County	ZIP Code	
Start Date	End Date								
06/02/2025	06/02/2026								
Region									
Midwest Region									
County									
(All)									
Anderson									
Bedford									
Benton									
Blount									
Carroll									
Cheatham									
Chester									
Decatur									
Dickson									
Download Excel									
		Midwest Region	Null	Intake Supervisor	Null	Null	Blount	Null	
		Midwest Region	Null	Ns2 Testuser	Null	Null	Anderson	38464	
		Midwest Region	Child Program Super	Gaurav Kumar	Null	Null	Dickson	38012	
		Midwest Region	CPS Supervisor	Intake Supervisor	Null	Null	Bedford	Null	
		Midwest Region	CPS Supervisor	Intake Supervisor	Null	Null	Blount	Null	
		Midwest Region	Cps Supervisor	Gaurav Kumar	Null	Null	Carroll	99999	
		Midwest Region	Cps Supervisor	Gaurav Kumar	Null	Null	Chester	Null	
		Midwest Region	Cps Supervisor	Intake Supervisor	Null	Null	Benton	Null	
		Midwest Region	Cps Supervisor	Intake Supervisor	Null	Null	Benton	Null	
		Midwest Region	Cps Supervisor	Intake Supervisor	Null	Null	Chester	38464	
		Midwest Region	Cps Supervisor	Intake Supervisor	OUT OF STATE COURTESY	Null	Benton	Null	
		Midwest Region	Cps Supervisor	Intake Supervisor	SIU INVESTIGATION	Null	Carroll	Null	
		Midwest Region	Cps Supervisor	Ns1 Testuser	Null	Null	Benton	Null	
		Midwest Region	Cps Supervisor	Ns1 Testuser	Null	Null	Benton	38464	
		Midwest Region	Cps Supervisor	Ns1 Testuser	Null	Null	Benton	38464	
		Midwest Region	Cps Supervisor	Ns1 Testuser	Null	Null	Benton	96543	
		Midwest Region	Cps Supervisor	Ns1 Testuser	Null	Null	Cheatham	38464	
		Midwest Region	Cps Supervisor	Ns1 Testuser	Null	PRIORITY 1	Carroll	38464	
		Midwest Region	Cps Supervisor	Ns1 Testuser	OUT OF STATE COURTESY	Null	Decatur	38464	
		Midwest Region	Cps Supervisor	Ns2 Testuser	Null	Null	Benton	Null	
		Midwest Region	Cps Supervisor	Ns2 Testuser	Null	Null	Benton	Null	
		Midwest Region	Cps Supervisor	Ns2 Testuser	Null	Null	Chester	Null	
		Midwest Region	Cps Supervisor 1	Intake Supervisor 1	Null	Null	Benton	Null	
		Midwest Region	Cps Supervisor 2	Intake Supervisor 1	Null	Null	Cheatham	Null	
		Midwest Region	Cps Supervisor 3	Intake Supervisor 1	Null	Null	Chester	Null	

- Lastly, we have a reset functionality, which resets all filters, except the date filter, to their default values. This can be done by clicking the **Reset** button on top of the filters.

Task 3: Downloading a Report

Every report will have a table which can be downloaded in Excel format with all the data elements required for the report.

1. Click the **Download Excel** button.
2. Select the **Report Table** option from the pop-up window.
3. Click **Download**.



Note: The filters selected will be applied to the downloaded excel.

Knowledge Check!

Question 1: Which dashboard widget provides a list of items assigned under the Supervisor's scope?

- A. Requests
- B. Items to Approve
- C. Associated Items
- D. Provider Types

Question 2: If the assigned approver is incorrect, what action should the supervisor take?

- A. Change provider type to Active
- B. Delete the approval record
- C. Reassign the approval request
- D. Create a new provider inquiry

Question 3: Which of the following is entered before clicking Approve/Reject on the pop-up?

- A. Comments
- B. NPI Number
- C. Unit Cost
- D. Policy Number

Question 4: Which notification message should the supervisors click to continue?

- A. Invoice Paid
- B. Incident Report Submitted
- C. Requesting Approval
- D. NPI Pending Approval

Glossary

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

Term	Definition
Abridge	To abridge means to end a record. It's often used interchangeably with "Created in Error" and is sometimes described as a soft delete; the record remains in C-First! for history/audit purposes, but it is no longer usable for business purposes.
Approved Foster Home	The point in the C-FIRST! process when a DCS home has completed the required review and approval activities and is approved to move forward as a foster home.
CCWIS	This refers to Comprehensive Child Welfare Information System.
C-FIRST!	Child and Family Information, Records System Tracking refers to the Tennessee's new Child Welfare platform built on Salesforce.
DCS	This refers to the Department of Children's Services (Tennessee).
FAIR	This term refers to Family Actively Improving Relationships.
Field	A part of an object that holds a specific piece of information, such as text or a number.
Inquiry	This refers to when a prospective provider has expressed interest or submitted an initial inquiry.
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.
RET	This refers to the Resource Eligibility Team.
Related List	A section of a record or other detail page that lists items related to that record.
Remittance Address	The address where payments to the Provider will be sent.

Term	Definition
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.
Smarty	Address validation service integrated into address entry workflows.
Widget	A small part of an app, like a button, search box that you can see or get information.
Withdrawn	This refers to a status when a provider application is no longer being pursued for some reason. Reasons may include a change in circumstances, a decision not to proceed, failure to provide required information, or other applicant-driven factors.