



C-FIRST! Training

Fiscal Learner Guide

Tennessee Department of Children's Services



Fiscal Course Learner Agenda

Day 1

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Introduction

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

This course provides practical end-to-end learning of the financial processes and tasks. The end-to-end flow for finance starts when the **rate structure** is established through the Day 0 setups (service taxonomy, rate maintenance and breakdown, Federal Medical Assistance Percentage (FMAP) rate settings and splits, and delegated authority/services) and through the Provider Module via provider agreements (provider agreement services and master service rates, including provider rates and unique care agreement add-on rates).

Let's Dive In

The Fiscal course drives **payments** across placements, case agreements, service referrals, and funding requests records (including DCS Foster Care, Residential Placements, Adoption/SPG Subsidies, ILA/RCP Stipends, Date-ranged services, and PCards), which then generate core financial records—**invoices, invoice costs, and transactions**. Payments are generated by applying the appropriate rate for the Service and Funding Sources based on the child's reimbursabilities. Note that the **Funding Sources** for each Service are set up by the Fiscal team using funding source maintenance, and funding hierarchy constructs.

The fiscal process also supports **adjustments** on payments based on the modification that happens on **Placement** and **Case Agreement** records. The adjustment process creates account receivables to maintain the Receivable Balance for Collections by creating receivable transactions. Workers can also manually write-off the Receivables using the Manual Action screen.

What to Expect

Throughout this guide, you will follow the end-to-end fiscal process in C-FIRST!, from general navigation and provider agreement activities through funding requests, payment processing, financial monitoring, and supervisor-specific functions. You will be tasked with:

1. Accessing the system, navigating key menus, and using homepage components, notifications, list views, and related list quick links efficiently.
2. Uploading, reviewing, downloading, and managing documents needed to support fiscal work.
3. Searching for Providers, reviewing Provider details, creating new Provider records, and associating Providers to the appropriate records.
4. Creating, reviewing, updating, and terminating Provider Agreements, including Agreement Services and Master Service Rates.

5. Reviewing funding source information and understanding how funding source maintenance and hierarchy support fiscal processing.
6. Reviewing and approving Funding Requests and verifying required request details before completing the process.
7. Reviewing invoices, validating invoice cost and related transactions, and releasing invoices for payment.
8. Reviewing Batch records, confirming invoice and Provider information, and verifying Trial Batch Runs.
9. Tracking financial transactions, monitoring payment processing status, reviewing invoice cost and transaction details, and adding general ledger details.
10. Applying supervisor functions, including submitting records for approval, approving or rejecting submitted records, reassigning work, reviewing approval history, and exporting transaction search results.

Your Role

You are responsible for processes related to fiscal work in C-FIRST!. Throughout this course, you will practice the steps used to support provider and agreement activities, funding requests, invoice review, payment processing, and financial monitoring. You will also learn how role-based permissions affect what you can view, update, submit, or approve, so you can complete your work accurately and understand when action is required from a supervisor or fiscal leader. We will also discuss supervisor-specific functions and practice the oversight steps that support approvals, quality checks, and financial accountability across the end-to-end fiscal process.

Course Objectives

Throughout this course, you will practice each skill hands-on in a C-FIRST! training environment. By the end of this course, you will be able to navigate the C-FIRST! funding screens, complete the tasks your role requires, and understand how your work connects to the broader child welfare process.

After completing this course, you will be able to:

- Navigate C-FIRST! to locate cases, manage your homepage, and use system features that support daily work
- Create and set up new providers, configure service rate tables, establish delegated authority agreements
- Manage funding hierarchies
- Process funding requests
- Review and validate payment records and track payment status across different payment types
- Track financial transactions and search transaction histories
- Perform supervisor-specific functions like approvals and exporting reports

Icons Used Throughout the Course

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

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

Module 1: General Navigation

This module covers the C-FIRST! search functionality for locating records, switching between list views, and managing the alerts and notifications that drive daily workflow. Users will practice accessing task notifications, switching between task views such as **All Tasks**, **Open Tasks**, **Overdue Tasks**, and **Today's Tasks**, navigating from a task to its related 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 completing this module, you will be able to:

- Log in to C-FIRST! and identify Homepage components
- Navigate between tabs and records using the global menu and Related List Quick Links
- Access, filter, and manage task notifications across different task views
- Mark tasks as complete and review approval notifications
- Pin default list views and customize Homepage preferences

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

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

Learning Objectives

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

Task 1: Log into the C-FIRST! Application

Let's see how you can Log in to C-FIRST! with the correct credentials.

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

Task 2: Review the Homepage Components

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

- **Today's Tasks:** This widget displays a list of all the tasks that are assigned to the worker and when it is due. The subject and the associated record ID are displayed. The arrow in the top right corner of the User Tasks widget displays Today's, My Tasks, All Overdue, Completed within Last 7 days and Delegated Tasks views. The **View All** button allows users to view all the tasks that are assigned to the worker.
- **Items to Approve:** This widget displays a list of the items assigned to the logged-in User. It includes information on what the item is and who submitted it for approval.

Task 3: Understand User Role Permissions

Note: 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.

In the C-FIRST! homepage Dashboard, the users have access to the following features:

- **App Launcher:** This allows the users to switch between different consoles and applications.
- **Global Search Bar:** This search bar is located at the top of the screen that enables users to search for records across multiple objects, including Intake records, cases, and persons in C-FIRST!.

- **Add Favorite Icon:** This is used to bookmark or add favorite screens, for users to jump to or view the screens.
- **Global Actions Icon:** This is used to create New Tasks, Events, Notes, Person or to log a call and email.
- **Guidance Center:** This is a go-to resource for any help, and provides the users with relevant articles, built-in support to help users get the most out of the C-FIRST! platform.
- **Salesforce Help:** This provides access to help and training with resources or support.
- **Setup:** This icon opens a drop-down menu where users can select Setup to access backend configurations, user management, and system settings. Users can also access the Service Setup and Salesforce Go options.
- **Notifications:** This alerts the users to new notifications or updates related to Intakes, Cases, Persons etc.
- **View Profile Icon:** This displays the user's profile details, Settings, Username, Display Density, and Logout.

Lesson 2: Navigating the Homepage and Global Menu

This lesson introduces the **Homepage** layout, dashboard widgets, navigation menus, and list views you will use daily. You will explore each section of the interface so you can quickly locate the tools and information you need. Understanding the global menu structure and Homepage components confirms that you can locate required information related to the tasks you perform in C-FIRST!.

Learning Objectives

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

Task 1: Navigate Using the Global Menu

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

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



System Tip!

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

Task 2: Access Provider records from Homepage Components

Your **Homepage** displays several components that provide direct access to your assigned tasks. 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
6. Click the **Home** tab to return to your **Homepage**. C-FIRST! displays the **Homepage**.



System Tip!

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

Task 3: Use Related List Quick Links

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

1. On the **Provider** record screen, scroll down to locate the **Related List Quick Links** section.
2. Click the **Provider Persons** hyperlink in the **Related List Quick Links** section. C-FIRST! displays the list of persons associated with the Provider.
3. Click the **Appeals** hyperlink in the **Related List Quick Links** section. C-FIRST! displays the list of appeals submitted by the Provider.
4. Click the **Placements** hyperlink in the **Related List Quick Links** section. C-FIRST! displays the Placements that are associated with the Provider. As part of Placements, when Placement is matched to a Provider, the Placement record will display in the Placements Related List.



System Tip!

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

Task 4: Pin Default List Views

Pinning a list view sets it as your default when you access that tab.

1. Click the desired tab in the navigation bar. C-FIRST! displays the list view.
2. Click the **dropdown arrow** next to the current view name and select the list view you wish to pin.
3. Locate the Pin button (push pin icon) next to the View dropdown and click the Pin button. C-FIRST! sets the view as your default view for the tab.
4. Click the **Home** tab in the navigation bar. C-FIRST! displays the view you pinned by default.

Task 5: Use List View Settings

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

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



System Tip!

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

Lesson 3: Document Management

In this lesson, you will learn about the robust and secure Document Management functionality within **C-FIRST!**. 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

Now let's locate a **Funding Request** record and access the documents/files attached to it using the **Attachments** tab.

1. Navigate to the **Service Requests** tab from the **Home** dropdown. The **Service Requests Recently Viewed** screen displays.
2. Click the desired hyperlink on the Provider **Funding Request ID** to navigate to the record. The **Funding Request** 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.
- C-FIRST! sorts the attachments list by created date, beginning with the most recent documents. Attachments with the Status as *Inactive* are hidden by default.

Task 2: Upload and Download Documents

Users can upload a new document to a record and download an existing document from the **Attachments** tab.

1. Click the **Attachments** tab of the **Funding Request** record.
2. Click the **Basic File Upload** button to upload a document. The **Upload File** pop-up displays. **Note:** Basic Upload functionality supports single document uploads.
3. Click the **Document Date** field to enter the date.
4. Click the **Document Category** dropdown and select *Financial*.

5. Click the **Document Sub-Category** and select *Funding Request Invoice*.
6. Click the **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. Enter a file name in the **Document Name** field.
8. Click **Save** to proceed. Once 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 **Advanced File Upload** button to upload, combine and split documents.
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 on the left-hand side of the ImageTrust screen. ImageTrust provides users with a wide variety of functions to split, combine, duplicate, or delete individual documents and pages from those documents. 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 assigned by the system using the same convention as uploading multiple files.



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.

Task 3: Search for Documents on the Attachments Tab

You need to locate a specific document previously uploaded to the Carter#### family case record using the document search feature.

1. Click **Search** on the **Attachments** tab. C-FIRST! displays the **Document Search** section above the attachments list.
2. Enter a value in the **Document Name** field to search by the user-provided document name.
3. Click the **Document Category** dropdown. C-FIRST! displays the available category values. Select the desired category to filter results.
4. Click the **Document Date** dropdown. C-FIRST! displays the available date filter options.
5. Select the desired date filter option. The following options are available:
 - Greater Than
 - Less Than
 - Equal To
 - Between
6. Enter the date in the **Document Date** field. If *Between* is selected, enter dates in both **File Upload Date** and **Document Date** fields.
7. Click **Update**. C-FIRST! filters the attachments list based on the provided search criteria.
8. Review the filtered results in the attachments list.
9. Click **Reset** to restore the attachments list to its original view.
10. Click **Hide Search** to close the **Document Search** section. C-FIRST! collapses the search fields and restores the default attachments list.



Process Tip!

At least one search parameter is required to filter the attachments list. Click the **Search Inactive Documents?** checkbox to include documents with a Status of *Inactive* in the search results.



System Tip!

Selecting *Between* displays a second date field. Both the start date and end date are required when using this option.

Task 4: Review the Service Invoice

Every time C-FIRST! generates an invoice record, a trigger creates an invoice PDF file that is sent over to Edison. That PDF file is available in the Attachments tab of an invoice.

1. Log in as a Fiscal Worker and navigate to the **Invoice** tab from the **Homepage**.
2. Click the **Invoice ID** from the list view.
3. Click the **Attachments** tab.
4. Click the **File Name** hyperlink to open the file and view the service invoice.

Lesson 4: Person Management

This lesson 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.

Learning Objectives

- Navigate to the Person Search functionality in C-FIRST!
- Execute searches using multiple search criteria including name, date of birth, and SSN

Task 1: Person Search

1. Log into C-FIRST! using your log in credentials. C-FIRST! displays the Homepage.
2. Select **Person Search** from the **Home** drop-down. The **Recently Viewed Person** screen displays.
3. Enter any known details on the **Search for a Person** screen. The search results display and show a list of potential matches, if any. **Note:** The more information you add, the more the system has to compare against other individuals in the system.
4. Click **Search**.



System Tip!

Person Search accepts multiple identifiers in one place. Those identifiers include Person Details, Address Details, and Case Details. The more information you add, the more C-FIRST! has to compare against other individuals in the system. C-FIRST! also searches for spelling variations and similar sounding words to the names you enter, so if a name is misspelled or mistyped, the search results will still display similar names.

Task 2: Person Record

A Person record is a persistent record, a unique identifier, that does not change regardless of how many intakes, or cases, or provider records.

1. From the Search Results
2. Click the drop down arrow at the end of the row from the search results and select view. C-FIRST! opens the Person Record.

Note: Please see the Person Record Types graphic below for more information.

Intake Person, Case Person, & Provider Person

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

PERSON RECORD (PID)

Person Record (PID)

Single persistent record — the PID never changes no matter how many intakes, cases, or provider records.
Jane Doe's PID 12345 stays 12345 across all records, forever.

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

Person Record

Knowledge Check!

Question 1: 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

Question 2: How does C-FIRST! sort the attachments list on a case record by default?

- A. By Document Date, beginning with the oldest documents
- B. By Document Category in alphabetical order
- C. By File Name in alphabetical order
- D. By created date, beginning with the most recent documents

Question 3: What happens when you select multiple attachments totaling more than 100 MB and click Download Files on the Attachments tab in C-FIRST!?

- A. C-FIRST! sends the selected files to your email address
- B. C-FIRST! merges the selected files into a single PDF document
- C. C-FIRST! packages the selected files into a zip file and begins the download
- D. C-FIRST! downloads each file individually to your computer

Question 4: When you change the Status field of an attachment to Inactive in C-FIRST!, which field is displayed and required before saving?

- A. Status Justification
- B. Supervisor Approval
- C. Archive Date
- D. Inactive Reason

Question 5: Which button allows you to set a list view as your default when accessing a tab?

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

Module 2: Provider and Contract Management

In this module, you will learn how to setup a Provider in C-FIRST!. You will create the Provider record and associate it with the application. You will also learn to review key Provider details, add an address, associate the person to the Provider and review information that will be used throughout licensing.

After completing this module, you will be able to:

- Search for a Provider
- Create Provider record and Associate Provider with the application
- Manage Provider Agreement
- Terminate a Provider Agreement

Lesson 1: Provider Profile Management

This lesson introduces learners to the first steps in working with the Provider. Let's start with using Provider Search to locate an existing provider record, reviewing key details (including license status), and determining whether to associate the provider record to the application or proceed with next steps of creating a new provider from an application.

Provider is an entity that provides services to DCS and associated families and children. This term is used for an Agency, Resource, Service Provider or Vendor, DCS Foster Home, and Residential.

Learning Objectives:

- Access Provider Search and view Provider details
- Create and Associate Provider with the application
- Review Provider Licensing Status

Task 1: Search for a Provider in C-FIRST!

The Provider Search Screen searches for the provider and their corresponding information by using information such as provider details, address, or provider types from the provider search screen. To locate the Parker family's existing provider record and proceed, follow the steps below:

1. Log in as the **Fiscal Director**, the **Homepage** displays.
2. Navigate to the **App Launcher** and type **Provider Search**.
3. Click on the Provider Search to be navigated to the **Provider Search** screen.

Note: Users can search for a Provider by three types:

- Search By Provider Detail
 - Search By Address Details
 - Search By Provider Type
4. Click the **First Name** field on the Search by **Provider Detail**, enter the *first name####*.
 5. Click the **Last Name** field on the **Search by Provider Detail**, enter the *last name####*.
 6. Click the **Provider Category** dropdown on the **Search by Provider Detail**, select the option.
 7. Click **Search**. The search results screen displays.
OR
 8. Click the **Address Line 1** field on the Search by **Address Details**, enter the *address*.
 9. Click the **Address Line 2** on the Search by **Address Details**, enter the *address*.
 10. Click the **City** field on the Search by **Address Details** and enter the *city*.
 11. Click the **County** dropdown on the Search by **Address Details** and select from the options.
 12. Click **Search**. The search results screen displays.
OR
 13. Click the **Provider Type** dropdown, select the *provider type*.
 14. Click the **Search**. The search results screen will display in a list with the following fields:
 - Provider ID
 - Account Name
 - First Name
 - Last Name/Organization
 - Region
 - Provider Types
 - Provider Type Status
 - Agreement Services
 - Business Phone
 - Email

- Provider Category



Process Tip!

- Before creating a new provider record, use the **Search** capability to confirm the provider doesn't already exist in the system. Search can match on provider name, contact information, and other identifiers.
- C-FIRST! alerts you to potential duplicates and lets you review existing provider records. This step helps protect data integrity and prevents creation of duplicate provider entries.

Task 2: View Provider Details

Once you have located the Provider record, to view the details of the Provider Record follow the steps below:

1. Navigate to the **Provider** tab from the home dropdown. The **Provider Search** screen displays.
2. Click the **Account Name** field, enter the *account name*.
3. Click **Search**. The search results screen displays.
4. Select the provider record that you want to review.
5. Click **View** from the dropdown of the record. The **Provider record** screen displays.
6. Review the following in the **Details** tab: The **Provider Information** section displays the details and basic information of the Provider with the following fields:
 - Provider ID
 - Account Name
 - First Name
 - Last Name
 - Provider Category
 - Provider Organization Name
 - Network Provider?
 - Website
 - Sexual Orientation
 - Marital Status of the Foster Parent
 - Region
 - Organization Phone

- Ext
 - Phone
 - Other Phone
 - Ext
 - Email
 - Primary Contact Phone
 - Ext
 - Primary Contact Email
 - Special Educational Capabilities
 - Facility Type
7. The **Child Preferences** section displays the child preference details with the following fields:
- Preferred Number of Children
 - Preferred Number of Siblings
 - Preferred Minimum Age
 - Preferred Maximum Age
 - Preferred Ethnicity
 - LGBTQ+
 - Preferred Language Spoken in the Home
 - Second Language
 - Family Situation
 - Preferred Gender
 - Preferred Race
 - Medical/Physical Preferences
 - Developmental/Behavioral Preferences
8. The **Reference Numbers** section displays the following fields:
- SSN
 - FEIN
 - UEI#
 - Created in Edison?
 - Edison Supplier ID
 - Edison Supplier Name
9. The **Organization Information** section displays the organization details of the provider with the following fields:
- Business Type
 - Other Business Type
 - Incorporation Status
 - Other Incorporation Status
 - Minority Status

- Small Business?
 - # of Years of Business
10. The **Facility/Home Information** section displays the details of the facility or home with the following fields:
- Male Capacity
 - Female Capacity
 - PREA Indicator
 - Gender Neutral Capacity
 - Residential Capacity
 - Pets
11. The **ICWA Information** displays the following fields:
- Membership or Eligible for Membership?
 - ICWA eligible?
12. The **Site Address/School** displays the following fields:
- Provider Site Address ID
 - School County
 - Provider Site Address
 - Elementary School
 - Middle School
 - High School
13. The **Assignment Information** – This displays the following fields: **Assigned Supervisor** and **Assigned Worker**.
14. Click **Save** and proceed.



System Tip!

To make any edits or updates to the provider record, the user can click the **Pencil** icon.

Task 3: Create New Provider

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 **Provider** tab, the Provider Recently Viewed list displays.
2. Click **New** to create a new Provider. The **Search for a Provider** screen displays.

3. Click **New Provider** button to create a new Provider. 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.
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. The following are the fields that a user needs to complete in the **Provider Information** section.
8. Click the **Account Name** field, enter the *account name*.
9. Click the **First Name** field, enter the *first name####*.
10. Click the **Last Name** field, enter the *last name####*.
11. Click the **Provider Category** dropdown, select from the option.
The options in the dropdown are:
 - Both
 - Direct Provider
 - Parent Organization Provider
12. Click the **Network Provider?** dropdown, select from the option.
13. Click the **Website** field, enter the website information.
14. Click the **Marital Status of the Foster Parent** dropdown and select from the options.
15. Click the **Organization Phone** field, enter the *number*.
16. Click the **Ext** field, enter the *ext*.
17. Click the **Other Phone** field, enter the *number*.
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 the appropriate special education capability.
21. Click the **Facility Type** dropdown, select from the options. The options in the dropdown 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
22. The following are the fields that a user needs to complete in the **Child Preferences** section.
23. Click the **Preferred Number of Children** field, enter the *number of children*.
24. Click the **Preferred Number of Siblings**, select the right arrow icon to select the *number of siblings* from the Available section.
25. Click the **Preferred Minimum Age** field, enter the *age*.
26. Click the **Preferred Maximum Age** field, enter *age*.
27. Click the **Preferred Ethnicity** dropdown, select the *ethnicity*.
28. Click the **LGBTQ+** dropdown, select from the option.
29. Click the **Preferred Language Spoken at Home** dropdown, select the *language*.
30. Click the **Second Language** dropdown, select the *language*.
31. Click the **Family Situation**, select the right arrow icon to select from the option 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
32. Click the **Preferred Gender**, select the right arrow icon to select the *gender* from the Available section.
 33. Click the **Preferred Race**, select the right arrow icon to select the *race* from the Available section.
 34. 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
 35. The following are the fields that a user needs to complete in the **Reference Numbers** section.
 36. Click the **SSN** field, enter the *social security number*.
 37. Click the **FEIN** field, enter the *number*.
 38. Click the **UEI#** field, enter the *number*.
 39. Click the **Created in Edison?** dropdown, select from the option.
 40. Click the **Edison Supplier ID** field, enter the *Supplier ID*.
 41. Click the **Edison Supplier Name** field, enter the *name*.
 42. The following are the fields that a user needs to complete in the **Organization Information** section.
 43. Click the **Business Type** dropdown and select the *business type*. The options in the dropdown are:
 - Corporation
 - Individual
 - Limited Liability Company
 - Limited Liability Partnership
 - Non-Profit Organization
 - Other Incorporated Entity
 - Partnership

- Sole Proprietorship
 - N/A
44. Click the **Other Business Type** field, enter the information.
 45. Click the **Incorporation Status** dropdown, select the *status*.
The options in the dropdown are:
 - For-profit
 - Governmental
 - Not-for-profit
 - Other
 46. Click the **Other Incorporation Status** field, enter the information.
 47. Click the **Minority Status** dropdown, select the *status*.
 48. Click the **Small Business?** dropdown, select from the option.
 49. Click the **# of Years of Business** dropdown, select from the option.
 50. In the **Facility/Home Information** section, click the **Male Capacity** field, enter the *capacity*.
 51. Click the **Female Capacity** field, enter the *capacity*.
 52. Click the **PREA Indicator** dropdown, select from the option.
 53. Click the **Gender Neutral Capacity**, enter the *capacity*.
 54. Click the **Pets** dropdown, select from the option.
 55. The following are the fields that a user needs to complete in the **ICWA Information** section.
 56. Click the **Foster Parent 1 Membership or Eligible for Membership?** dropdown, select from the option.
 57. Click the **ICWA Eligible?** dropdown, select from the option.
 58. Click the **Foster Parent 2 Membership or Eligible for Membership?** dropdown, select from the option.
 59. Click the **ICWA Eligible?** dropdown, select from the option.
 60. The following are the fields that a user needs to complete in the **Site Address/School** section.
 61. Click the **Provider Site Address ID** field, enter the *site address ID*.
 62. Click the **School County** dropdown, select the *county*.
 63. Click the **Elementary School** dropdown, select from the option.
 64. Click the **Middle School** dropdown, select from the option.
 65. Click the **High School** dropdown, select from the option.

66. The following are the fields that a user needs to complete in the **Assignment Information** section.
67. Click the **Assigned Supervisor** field, enter the *supervisor*.
68. Click the **Assigned Worker** field, enter the *worker*.
69. Click **Save**. The Provider record screen displays.

Task 4: Review Provider License

To review the license information for a provider record, follow the steps below:

1. Navigate to the **Provider** tab from the home dropdown. The **Provider Recently Viewed** screen displays.
2. Click the desired hyperlink on **Account Name**. The **Provider** screen displays.
3. Click the **Licenses** hyperlink, from the **Related List Quick Links** section. The **Licenses** screen displays.
4. Click the desired hyperlink on **License ID**. The **Provider License** screen displays.
5. Review the following on the **Details** tab:
 - **Information** – This section provides key details such as the **License ID, Status, License Number, Licensing Agency, License Type, License Category, Other** and **State**.
 - **Navigation Links** – This section provides direct navigation to the associated provider related to this license.
 - **System Information** - This section specifies who created and who last modified the record.
6. Click the **Approval History** hyperlink on the **Related List Quick Links** section to view details of the approval of the license. The list view displays the fields **Step Name, Date, Status, Assigned To, Actual Approver** and **Comments**.

Task 5: Update Provider Demographics and Preferences Through a Provider Request

Demographics and Preferences for a Provider are captured in their profile as well as in the agreements. To update demographic details on a Provider profile, a Provider can create a support ticket in the Provider Portal. The assigned team then works on this *Provider*

Request and updates the required information. When a Provider Request is received from the Provider Portal, C-FIRST! creates a task for the Owner of the Provider Record.

1. Navigate to the desired Provider record from the Homepage.
2. Click the **Provider Requests** hyperlink from the **Related List Quick Links** section. The **Provider Requests** list view displays the list of Provider Requests created for the Provider including details such as Request ID, Request Type, Subject, Request Date, and Request Status.
3. Click the **Provider Request** with the status as **Pending**.
4. Review the **Request Type** and the **Comments** field to understand the change required.
5. Click the hyperlink in the **Provider** field to open the provider record. Update the required fields in the Provider profile.
6. Click **Save**. Navigate back to the Provider Request screen.
7. Click the **Pencil** icon in the **Request Status** field.
8. Select *Completed*.
9. Enter comments in the **DCS Response** field.
10. Click **Save**. The demographics and preferences are updated.



Process Tip!

The Provider **Request Status** in a new Provider Request received via the Provider Portal is initially set to *Pending*. As the Worker begins to work on the request, they update the status to *In Progress*. If the request was created in error, the Worker marks the status as *Abridged* and adds comments in the **Abridged Reason** field.

When the **Request Type** is set to Additional Information Request Response, all attached documents will be uploaded to the attachments tab of any Waiting for Additional Information Provider Monitoring record of type Family Preservation, PME, or Unannounced Visit Tool.

Lesson 2: Manage Provider Agreement

This lesson builds on Provider Profile Management by introducing how to access, create, update, and close out Provider Agreements. You'll learn how to review changes made to an agreement over time, create a renewal agreement (Foster Family), add Agreement Services,

update provider demographics and placement preferences captured on the agreement. You will also learn how to withdraw an agreement when it should no longer proceed. Provider Agreements document the active terms, dates, approvals, and service details tied to a Provider record.

Learning Objectives:

- Access and navigate Provider Agreements from a Provider record
- View and interpret Agreement History details (date, field, user, original/new values)
- Create a new Foster Family renewal agreement and complete required sections
- Add and verify Agreement Services on an agreement
- Update Provider Information fields on Pending agreements (Foster Family/Kinship)
- Withdraw an agreement correctly and document the termination reason

Task 1: View Agreement History

1. Navigate to an existing Provider record and click the **Agreements** hyperlink from the **Related List Quick Links** section.
2. Select the relevant **Agreement ID** hyperlink from the list view, the Agreement Details screen displays.
3. Click the **Agreement History** hyperlink from the **Related List Quick Links** section to view the details. The **Agreement History** List View displays the following fields:
 - **Date** – This captures the date of change.
 - **Field** – This captures the field that is changed.
 - **User** – This captures the user that had made the change.
 - **Original Value** – This captures the original value.
 - **New Value** – This captures the new value.

Task 2: Create New Agreement (Renewals)

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**.
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:
 6. Click the **Agreement Start Date** field, enter the *date*.
 7. Click the **Agreement End Date** field, enter the *date*.
 8. Click the **Notes** field, enter the *notes*.
9. You need to complete the following fields in the **Provider Information** section:
 10. Click the **Accepts Number of Children** field, enter the *number*.
 11. Click the **Accepts Number of Siblings** and select the right arrow icon to select the relevant *number of siblings* from the **Available** section.
 12. Click the **Accepts Minimum Age** field, enter the *minimum age*.
 13. Click the **Accepts Maximum Age** field, enter the *maximum age*.
 14. Click the **Preferred Ethnicity** and select the right arrow icon to select the *preferred ethnicity* from the **Available** section.
 15. Click the **LGBTQ+** dropdown, select the option.
 16. Click the **Language Spoken in the Home** dropdown, select the *language*.
 17. Click the **Second Language** dropdown, select the *language*.
 18. Click the **Family Situation** and select the right arrow icon to select the *family situation* from the **Available** section.
 19. Click the **Accepts Gender** and select the right arrow icon to select the *gender accepted* from the **Available** section.
 20. Click the **Accepts Race** and select the right arrow icon to select the *race accepted* from the **Available** section.
 21. Click the **Accepts Medical/Physical** and select the right arrow icon to select the *medical/physical* condition from the **Available** section.
 22. Click the **Developmental/Behavioral** and select the right arrow icon to select the *developmental/behavioral* condition from the **Available** section.
23. You need to complete the following in the **Approval History** section:

24. Click the **Assigned Worker** field, enter the *assigned worker*.
25. Click the **Assigned Supervisor** field, enter the *assigned supervisor*.
26. Click **Save**. A new Agreement has been created successfully.

Task 3: 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 information.
7. Click **Search**. The search results display.
8. Click the checkbox on the desired service record and click **Associate**. The record has been associated successfully.
9. Navigate back to the **Agreement Services** list view. A new **Agreement Service** has been added successfully.

Task 4: Update Provider Demographics and Preferences on Provider Agreements

1. Navigate to the desired Provider record from the Homepage.
2. Click the **Agreements** hyperlink from the **Related List Quick Links** section.

3. Click the **Agreement ID** in *Pending* status (Foster Family and Kinship **Record Type** only) to open the agreement record screen.
4. Scroll down to the **Provider Information** section and click the **Pencil** icon to make the fields editable. Update the required fields.
5. Click **Save**.

Task 5: Terminate (Withdraw) an Agreement

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 for an agreement in Pending status.
4. Click the **Pencil** icon in the **Status** field. To terminate or withdraw this agreement, change the Status to *Withdrawn*.
Note: Select Abridged if the agreement was created in error.
5. Enter the reason for terminating or withdrawing this agreement in the **Notes** field.
6. Click **Save**.

Note: Additionally, users must submit a Data Fix ticket to get the ODGA group to terminate this agreement.

Lesson 3: Service Agreements

Next, in this lesson you will learn how to locate and review the Agreement Services and Master Service Rates to assess the services provided by the Provider and the associated cost.

Learning Objectives:

- Reviewing Service Agreements to assess what services are provided
- Reviewing the Master Service Rates to assess the cost associated with the services

Task 1: Locate and Review Service Agreements

1. Navigate to the **Provider** tab from the home dropdown. The **Provider Recently Viewed** screen displays.
2. Click the Provider **Account Name** hyperlink that was selected. The **Provider Details** screen displays.
3. Click **Agreements** hyperlink from the **Related List Quick Links** section. The **Agreements** screen displays.
4. Click the desired **Agreement ID** hyperlink. The **Agreement** screen displays.
5. The **Details** tab displays the following sections:
 - **Information** – This section displays the primary agreement fields such as **Provider, Agreement ID, Agreement Start Date, Agreement End Date, Status, Agreement Type, and Notes.**
 - **Provider Information** – This tab captures the Provider acceptance criteria and preferences used to match a child to an appropriate placement. It documents what the Provider will accept and whether they can support medical/physical and developmental/behavioral needs.
6. Click the **Agreement Services** hyperlink from the **Related List Quick Links** section. The **Agreement Services** screen displays.
7. Click the desired **Service ID** hyperlink. The **Agreement Services** screen displays.
8. The **Details** tab displays the following sections:
 - **Information** – This section displays the primary details of the Agreement Service. The fields include **Service ID, Service Taxonomy ID, Level 1 Service, Level 2 Service, Level 3 Service, Case Person, Service Start Date, Service End Date, Service County, Is this a unique care agreement service?, Agreement Service Status, Male Minimum Age, Male Maximum Age, Female Minimum Age, Female Maximum Age, and Notes.**
 - **Capacity Information** – This section displays the Provider's capacity for different genders to help assess the service availability. The fields include **Male Capacity, Female Capacity, Gender Neutral Capacity, and Total Capacity.**

- **Vendor Information** – This section displays the logistical information about the vendor. The fields include **Edison Supplier Location**, **Address Sequence**, **Edison Supplier**, and **Remittance Address**.
- **Exclusion Criteria** – This section displays the preferences, limitations regarding child placements.

Task 2: View the 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 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 the **Unit Cost**, **Master Service Rate Start Date**, and **Master Service End Date** fields.
7. Click the **Unit Cost** hyperlink to view the details.
8. The **Information** tab displays the following fields: **Unit Cost**, **Master Service Rate Start Date**, and **Master Service Rate End Date**.

Task 3: Create 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 on **Agreement ID**. The Agreement screen displays.
4. Click the **Agreement Services** hyperlink from the **Related List Quick Links** section. The **Agreement Services** screen list view displays.

5. Click the desired hyperlink on **Service ID**. The selected **Agreement Service** screen displays.
6. Click the **Master Service Rates** hyperlink from the **Related List Quick Links** section. The **Master Service Rates** screen displays. Note: The **Master Service Rates** List View displays the list of available Master Services Rates on the Agreement Service including **Unit Cost**, **Master Service Rate Start Date**, and **Master Service Rate End Date**.
7. Click the hyperlink in the **Unit Cost** column to view an existing record.
8. Click the **New Master Service Rate** button, to create a new record. The new **Master Service Rate** pop-up will appear.
9. Click the **Unit Cost** field, enter the appropriate cost.
10. Click the **Master Service Rate Start Date** field, enter the appropriate date.
11. Click the **Master Service Rate End Date** field, enter the appropriate date.
12. Click **Save**. The Master Service Rate has been created successfully.

Lesson 4: Delegated Authority Governance

In this lesson, you will learn how Delegated Authority provides funding and authority to third-party providers (vendors) to deliver specific services to children and families served by DCS. Depending on the child's or family's needs and the approved Delegated Authority, these services may include:

- Medical care
- Behavioral health services
- Other support services

You will also learn how Delegated Authority helps DCS and contracted providers work together to make sure services are authorized, documented, coordinated, and delivered according to DCS requirements.

Learning Objectives:

- View Delegated Authority Records
- Amend a Completed Delegated Authority Record

- Create New Delegated Authority
- Create New Delegated Authority Service

Task 1: View Delegated Authority Records

1. Click the **Delegated Authority** tab from the **Home** dropdown. This screen displays a list of Delegated Authority records that have been entered for defining payment percentages for funding types.
2. Review the **Effective Start Date** and **Expiration Date** columns to understand the records that are nearing expiration.
3. Lastly, review the **Delegated Authority Service Description** and **DA Maximum Liability** for the maximum liability amount of the Delegated Authority.

Task 2: Amend a Completed Delegated Authority Record

1. Navigate to the **Delegated Authority** tab from the **Home** dropdown.
2. Click the required **Delegated Authority ID** hyperlink with the **Status** as *Completed*.
3. Click the Amend **Delegated Authority** button.
4. Click the **Finish** button to acknowledge that the *"Delegated Authority status has been set to Pending."* Edit the details in the record as required.
5. Click **Save**.

Task 3: Create New Delegated Authority

1. From the **Delegated Authority** tab, click **New** to create a new record.
2. Click the **Delegated Authority Service Description** field and enter the description.
3. Click the **Edison ID** field and enter the Edison ID which must be 25 numeric characters (use leading zeros as necessary).
4. The default option in the Send to EDISON w/o DA ID dropdown is **No**. If the record needs to be sent to EDISON without the DA ID because DA has reached its maximum limit, select **Yes**.
5. Click the **DA Maximum Liability** field and enter the liability in dollars.
6. Click the **Effective Start Date** field and enter the start date.
7. Click the **Expiration Date** field and enter the expiration date.

8. The default option in the **Status** dropdown is *Pending*. If the record has been completed, select *Completed*, save and the fields on the screen become read-only.
9. Click **Save**. The new **Delegated Authority** record is created. The **Delegated Authority ID** and **Remaining Balance** fields are calculated at save.



System Tip!

- To calculate the **Remaining Balance**, C-FIRST! looks at all the payments, adjustments, recoupment transactions associated with the Delegated Authority ID.
- To change the **Status** to *Completed*, there must be at least one **Delegated Authority Service** record associated with the delegated authority record.

Task 4: View the Delegated Authority Service

1. Navigate to the **Delegated Authority** tab from the **Home** dropdown.
2. Click the required Delegated Authority ID hyperlink to open the record.
3. Click the **Delegated Authority Services** hyperlink from the **Related List Quick Links** section. The Delegated Authority Service list view displays all Delegated Authority Service records in both Active and Inactive statuses.
4. Review the **Service Taxonomy ID, Level 1, 2 and 3** details for each record.
5. To view an existing service record, click the **Delegated Authority Service ID** to open the record.

Task 5: Create New Delegated Authority Service

1. From the **Delegated Authority Service** screen, click **New** to create a new service record.
2. Click the **Service Taxonomy ID** field and enter the ID.
3. Click the **Effective Start Date** field and enter the date.
4. Click the **Effective End Date** field and enter the date.
5. Click **Save**. The **Level 1, 2 and 3 Service** fields are calculated on save based on the selected Service Taxonomy ID.

6. The Delegated Authority Service will display the **Delegated Authority Service History** related list that maintains a chronological record of all actions taken on the record.
7. The Delegated Authority record displays the **Delegated Authority History** related list that maintains a chronological record of all actions taken on the record.



System Tip!

Users can only create one Delegated Authority Service with the same Service Taxonomy ID and overlapping Effective Start Date and Expiration Date.

Knowledge Check!

Question 1: To access a Provider's Service Agreement, which screen gives you access to the Service Agreement quick link?

- A. Placement Provider Application
- B. Related List Quick Links
- C. Homepage
- D. Provider Details screen

Question 2: Which are the fields that are displayed in the Master Service Rates list view?

- A. Provider Category, Primary Language, County
- B. Unit Cost, Master Service Rate Start Date, Master Service Rate End Date
- C. Requested Placement Type, Earliest Available Date/Time
- D. Document Category, Document Sub-Category, Document Name

Question 3: From an Agreement Service, where do you go to view or create rate records?

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

Question 4: Agreement Services and Master Service Rates help define services and rate periods tied to an agreement.

- A. True
- B. False

Question 5: Which search can be performed by Provider Detail, Address Details, or Provider Type?

- A. Provider Search
- B. Placement Search
- C. Agreement Search
- D. Application Search

Question 6: After you run a search and find the correct provider, what action links you to the existing record?

- A. New
- B. Upload all documents
- C. Associate
- D. Disposition

Question 7: Which of the following is the first step before creating a new provider?

- A. Complete payment processing
- B. Search for an existing provider record
- C. Approve a license
- D. Create a placement agreement

Module 3: Funding Source Management

Funding Source Management helps to capture data associated with funding sources, any change made to an element of the budget, service category/type or funding source, and quickly set up a new funding source and map it to the services it can cover. C-FIRST! collects and manages all data necessary for funding sources and expenditure accounting processes and helps reconfigure or reallocate funding for services currently in progress if a funding source or contractor becomes unavailable.

After completing this module, you will be able to:

- Create funding hierarchies
- Create and Manage Service Taxonomy
- Create Federal Medical Assistance Percentage

Lesson 1: Funding Hierarchy

In this lesson, you will learn how to add a new funding source order that determines how transactions are stamped when a client meets the criteria for that funding source.

Learning Objectives:

- Review Funding Hierarchy Structure
- Create a New Funding Hierarchy Group
- View Funding Hierarchy Group History
- Create a Funding Source Hierarchy record

Task 1: Review Funding Hierarchy Structure

1. To view the list of Funding Hierarchy Group records, Log in as the Fiscal Director and click the **Funding Hierarchy Group** tab from the **Home** dropdown.
2. Review the **Funding Hierarchy Group** list view screen. The screen displays the **Funding Hierarchy Group ID, Funding Hierarchy Group Name, Start Date, End Date** and the **Status** of these groups.

Task 2: Create New Funding Hierarchy Group

1. Click **New** on the **Funding Hierarchy Group** list view screen. The **New Funding Hierarchy Group** screen displays.

2. Click the **Funding Hierarchy Group Name** field and enter the name.
3. Select the **Status** of the group as *Active*.
4. Click the **Start Date** field and enter the date.
5. Click the **End Date** field and enter the date.
6. Click **Save**. The record displays **Funding Hierarchy Group History** related lists that maintains a chronological record of all actions taken on this record.

Note: There can only be one Funding Hierarchy Group record with the same name, start and end date.

Task 3: View Funding Source Hierarchy

1. Click the **Funding Hierarchy Group** tab from the **Home** dropdown.
2. Click the **Funding Hierarchy Group ID** hyperlink from the list view screen.
3. Click the **Funding Source Hierarchy** hyperlink from the Related List Quick Links section. The **Funding Source Hierarchy** list view displays the list of Funding Source Hierarchy records associated with the Funding Hierarchy Group selected.
4. Review the **Funding Source Hierarchy ID, Funding Hierarchy Group Name, Funding Order, Funding Source, Funding Start Date** and **Funding End Date**.
5. Click the **Funding Source Maintenance** hyperlink to open and review the Funding Source Maintenance record.
6. Identify the **Funding Source Maintenance History** and the **Funding Source Transactions** related list in the record.

Task 4: Create a Funding Source Hierarchy Record

1. Click **New** from the **Funding Source Hierarchy** list view.
2. Select the **Funding Source** from the list displayed.
3. Select the **Status** of the hierarchy as *Active*.
4. Select the **Funding Order** of this hierarchy record.
5. Enter the **Funding Start Date**.
6. Enter the **Funding End Date**, if known.
7. Click **Save**. The record displays **Funding Source Hierarchy History** related lists that maintains a chronological record of all actions taken on this record.

Lesson 2: Service Taxonomy

In this lesson, you will learn how to add a Service Taxonomy record to add new programs and services in order to expand our service offerings without requiring technical development or system modifications. A Contract Administrator can create custom service levels that can be applied to services. A Service Taxonomy record is set up at the system level and can have multiple taxonomy classifications and sub-services.

Learning Objectives:

- Add new Service Taxonomy record
- Add new Rate Maintenance record
- Add new Rate Maintenance Breakdown record

Task 1: Add New Service Taxonomy Record

1. Click **Service Taxonomy** tab from the **Home** dropdown.
2. Click the **New Service Taxonomy** button.
3. In the **Service Taxonomy Information** section, click the **Level 1 Service** field and enter the Level 1 Service.
4. Click the **Level 2 Service** field and enter the Level 2 Service.
5. Click the **Level 3 Service** field and enter the Level 3 Service.
6. Click the **Service Status** dropdown and select the status of the Service Taxonomy.
7. Click the **Service Delivery Type** dropdown and select an option. The options in the dropdown are:
 - Case Agreement
 - Funding Request
 - Non-Paid
 - Placement
 - Service Referral
8. Click the **Min Age** field and enter the minimum age for the Service.
9. Click the **Max Age** field and enter the maximum age for the Service.
10. Navigate to the **Indicators** section.
11. Click the **Paid/Non-Paid Service** dropdown and select whether the service is paid or unpaid.

12. Click the **In Home Continuum Service** dropdown and select if the service is in home or out of home.
13. Click the **FFPSA Service** dropdown and select if the service is FFPSA Service.
14. Click the **Human Trafficking** dropdown and select if the Service is for Human Trafficking.
15. Click the **Medicaid Billable Service** dropdown and select if the service is Medicaid eligible service.
16. Click the **Delegated Authority Governance** dropdown and select if the service is governed by DA.
17. Click the **Bright Futures Service** dropdown and select if the service is bright futures service.
18. Click the **Additional Rate Indicator** dropdown and select if the service has additional rate.
19. Click the **IV-E FC Service** dropdown and select if the service is for foster care.
20. Click the **IV-E QRTP Service** dropdown and select if services is for QRTP.
21. Click the **Custodial/Non-Custodial Service** dropdown and select whether the Service is custodial/non-custodial.

Note: The **Department ID (Custody)** and **Department ID (Non-Custody)** fields are displayed after **Custodial/Non-Custodial Service** field is selected.

22. Click the **NYTD Service** dropdown and select the National Youth in Transition Database (NYTD) Service indicator.
23. Navigate to the **Billing Code Information** section.
24. Click the **Category Code** field and enter the Category Code.
25. Click the **Origin Code** field and enter the origin code. The **Origin Code Description** field is calculated upon save.
26. Click the **User Code** field and enter the user code. The **User Code Description** field is calculated upon save.
27. Click the **HCPC Code** field and enter the HCPC code. The **HCPC Modifier Code** field is calculated upon save.
28. Click the **Account Code** field and enter the account code. The **Account Code Description** field is calculated upon save.
29. Click the **Program Code** field and enter the Program Code. The **Program Code Description** field is calculated upon save.
30. Click the **Fund Code** field and enter the Fund Code.

31. Click **Save**. The new record displays **Service Taxonomy History** related lists that maintain a chronological record of all actions taken on this record.

Note: There can only be one Service Taxonomy with the same Level 1, Level 2, and Level 3 Service Names.



System Tip!

C-FIRST! generates the **Service Taxonomy ID** by using the following formula: System generated number + Level 1 Service + Level 2 Service + Level 3 Service.

Task 2: Add New Rate Maintenance Record

1. Navigate to the **Service Taxonomy** record.
2. Click the **Rate Maintenance** hyperlink from the **Related Lists Quick Links** section.
3. Click **New** on the Rate Maintenance screen.
4. Click the **Min Age** field and enter the minimum age for the Service.
5. Click the **Max Age** field and enter the maximum age for the service.
6. Click the **Effective Service Start Date** field and enter the start date.
7. Click the **Effective Service End Date** field and enter the end date.
8. Click the **Payment Rate Type** dropdown and select the payment rate type. The options in the dropdown are:
 - Emergency
 - Expedited
 - Extraordinary 1
 - Extraordinary 2
 - Extraordinary 3
 - ICPC Board Rate w/Daycare ages 0-2
 - ICPC Board Rate w/ Full-Time Daycare ages 3-12
 - ICPC Board Rate w/ Part-Time Daycare ages 3-12
 - Incentive Rate
 - Special
 - Standard

9. Click the **Unit Type** dropdown and select the unit type. The options in the dropdown are:
 - Amount
 - Days
 - Hours
 - Minutes
 - Pages
 - Sessions
 - Tests
 - Units
 - Words
10. Click the **Rate Amount** field and enter the Rate Amount.
11. Click the **Max Limit Rate Amount** field and enter the maximum limit amount for service.
12. Click **Save**. The new record displays **Rate Maintenance History** related list that maintains a chronological record of all actions taken on this record.



System Tip!

- For a **Rate Maintenance** record to be active, there must be at least one active **Rate Maintenance Breakdown** record.
- For an active **Rate Maintenance** record, the sum of Rate Breakdown Amount on all the Rate Maintenance Breakdown records must equal to the Rate Amount.
- There can be only **one active Rate Maintenance** record with the same Service Taxonomy ID, Payment Rate Type, Min Age, Max Age, Effective Service Start Date, and Effective Service End Date.

Task 3: Add New Rate Maintenance Breakdown Record

1. Navigate to the **Rate Maintenance** record.
2. Click the **Rate Maintenance Breakdown** hyperlink from the **Related List Quick Links** section.
3. Click **New**. The **New Rate Maintenance Breakdown** screen displays.
4. Click the **Rate Breakdown Status** dropdown and select *Active*.
5. Click the **Rate Breakdown Type** dropdown and select *Amount* or *Percentage*.
6. Click the **Breakdown Description** dropdown and select an option. The options in the dropdown are:
 - Additional Rate
 - Grant
 - Other
 - Residential Treatment
 - Room & Board
 - Room & Board - EFC
 - Room & Board - In Home
 - State
7. Click the **Breakdown Order** dropdown and select the breakdown order number.



Process Tip!

Breakdown Order 1 must be added before you can add other breakdown orders i.e. the Rate Maintenance Breakdown records must be created in the chronological breakdown order.

8. Click the **Funding Hierarchy Group Apply** dropdown and select *Yes* or *No*.

Note: If **Funding Hierarchy Group Apply** is *Yes*, then enter **Funding Hierarchy Group Name**. If **Funding Hierarchy Group Apply** is *No*, then enter **Funding Source**.

9. Click **Save**. The new record displays **Rate Maintenance Breakdown History** related list that maintains a chronological record of all actions taken on this record.



System Tip!

- There can only be **one active Rate Maintenance Breakdown** record with the same Breakdown Order.

Lesson 3: Federal Medical Assistance Percentage (FMAP)

The Fiscal Director adds a new Federal Medical Assistance Percentage (FMAP) Rate Settings record to maintain the payment splits between activity codes on the IV-E Foster Care Maintenance funding source. The user then creates a FMAP Split record to specify the split percentages across different activity codes and assigns a Project ID. Once selected, the Project ID populates from the Project ID in the Rate Setting.

FMAP rate setting determines the federal and state funding split for Title IV-E programs, which provides federal financial assistance to states for child welfare services, including foster care, adoption, and guardianship assistance. This rate ensures that states receive appropriate federal support based on their fiscal capacity, helping to cover the costs associated with the care and maintenance of children in need.

Learning Objectives:

- Create New FMAP Rate Setting
- Create New FMAP Splits

Task 1: Create New FMAP Rate Setting

1. Log in as the Fiscal Director and click the **FMAP Rate Settings** tab from the **Home** dropdown. The FMAP Rate Settings list view displays the list of FMAP Rate Setting records.
2. Click **New**. The **New FMAP Rate Settings** pop-up displays.
3. Select the funding source category for this FMAP from the **Funding Source** field.
4. Click the **Effective Start Date** field and enter the date.
5. Click the **Effective End Date** field and enter the date if known.

6. Select *Active* from the **Status** dropdown. The default option is *Inactive*.
7. Click **Save**. The **FMAP ID**, **Funding Source Maintenance** and **Project ID** fields are calculated upon save. The new **FMAP Rate Settings** record displays the FMAP History related list that maintains a chronological record of all actions taken on this record.

Note: There can only be one FMAP Rate Setting with the same Funding Source and Start Date.

Task 2: Create New FMAP Splits

Now let's add funding split for different funding sources.

1. Log in as the Fiscal Director and click the **FMAP Rate Settings** tab from the **Home** dropdown.
2. Click the **FMAP ID** hyperlink to open a record.
3. Click the FMAP Splits hyperlink from the **Related List Quick Links** section.
4. Click **New** in the FMAP Split list view screen.
5. Click the **Effective Start Date** field and enter the date.
6. Click the **Effective End Date** and enter the date if known.
7. Select *Active* from the **Status** dropdown. The default option is *Inactive*.
8. Click the **Activity Code** dropdown and select an option. The options in the dropdown are:
 - ADOPT
 - BLUNG
 - CSUPPORT
 - CUSTODY
 - FEDERAL
 - FOUNDATION
 - INTERFED
 - INTERMATCH
 - NONCUST
 - NONCUSTODY
 - POSTAA
 - PROGRAMINC

- RR
 - Special Circumstance
 - SSA
 - SSI
 - STATE
 - TNCARERES
 - VA
9. Click the **Percentage** field and enter the percentage of the split. **Note:** The sum of all percentage values across the active FMAP Split records must equal 100%.
 10. Click **Save**. The new **FMAP Split** record displays the FMAP Split History related list that maintains a chronological record of all actions taken on this record.

Task 3: Assign Project ID to FMAP Split

1. Log in as the Fiscal Director and navigate to the **FMAP Split** record.
2. Click the **Assign Project ID** button on the top right corner. The **Assign Project ID** pop-up displays. The pop-up lists the names of the Project IDs that are available on the parent record, FMAP Rate Setting.
3. Select only one **Project ID** radio button per FMAP Split record.
4. Click **Finish**. The Project ID field is updated.

Knowledge Check!

Question 1: How does C-FIRST! generate the Service Taxonomy ID?

- A. System generated number + Level 1 Service + Level 2 Service + Level 3 Service.
- B. System generated number + Additional Rate Indicator
- C. System generated number + NYTD Service
- D. System generated number + Category Code

Question 2: For a Rate Maintenance record to be active, there must be at least one active _____ record.

- A. Invoice Cost
- B. FMAP Splits
- C. Service Taxonomy

D. Rate Maintenance Breakdown

Question 3: FMAP rate setting determines the federal and state funding split for which of the following program type?

- A. Bright Futures
- B. Relative Caregiver Program
- C. Title IV-E programs
- D. Juvenile Justice

Question 4: The sum of all percentage values across the active FMAP Split records must equal to what percentage?

- A. 50%
- B. 75%
- C. 100%
- D. None of the above

Module 4: Service Requests

The Service Requests record stores details of Service Referrals and Funding Requests related to a Case, Person, Client, or Provider. The services requested by using the Service Referral functionality can be contracted or community resource services, such as Psychiatric Evaluation or Food Banks.

In addition, Funding Request for emergency services and basic needs, which may be paid by DCS Payment Card (P Card) or a physical check or ETF/Direct Deposit, can be processed using a service request of type Funding Request.

Note: Updates nor changes can be made on completed request. If there is a need to change a date, a vendor, a rate, or payment type the FSW will have to enter a new Funding Request.

After completing this module, you will be able to:

- Navigate to Service Requests and identify Service Referrals and Funding Requests
- Validate required Service Request fields
- Complete a Service Request by updating Status appropriately

Lesson 1: Understanding Service Referrals

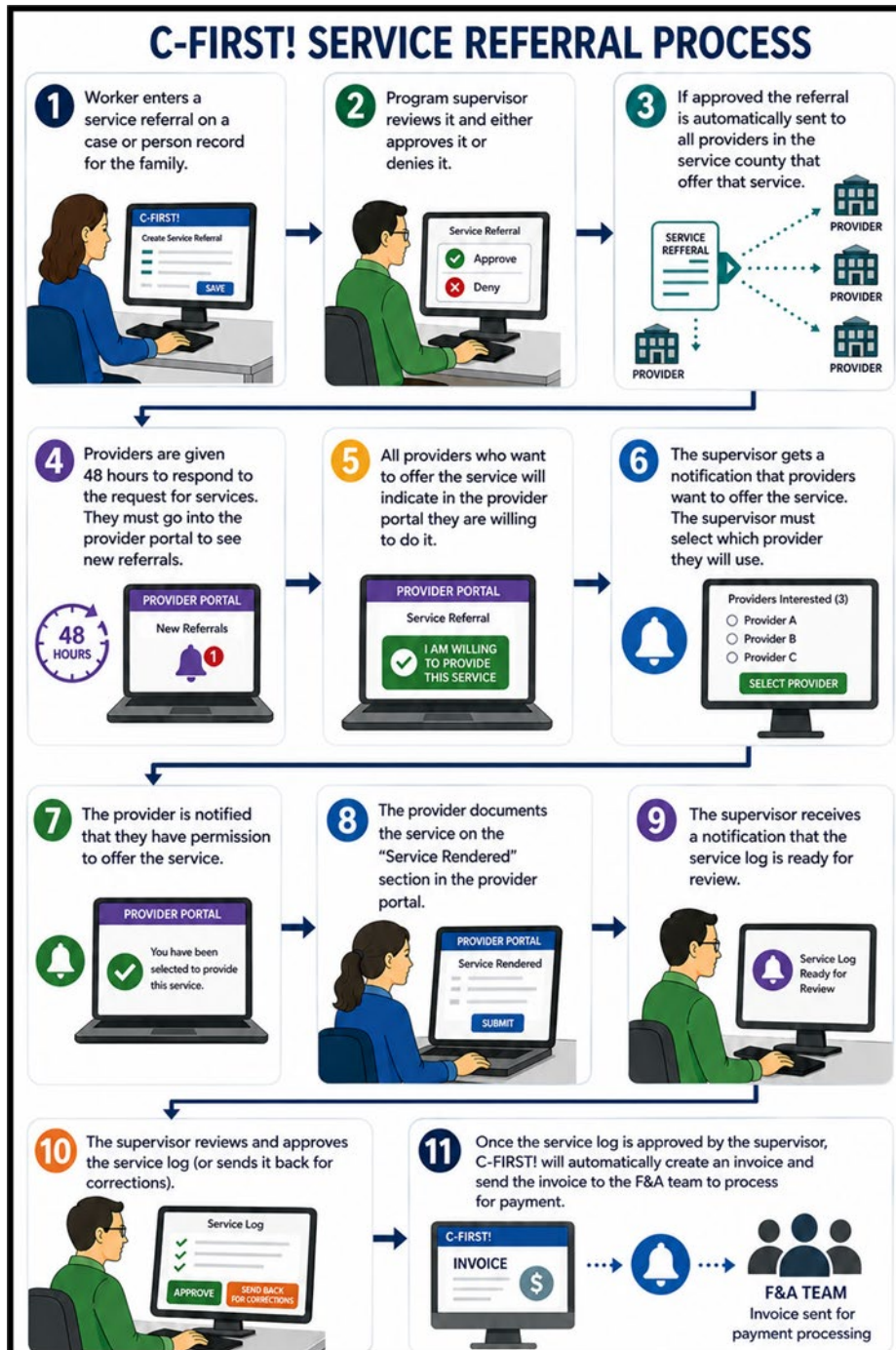
This lesson explains how the Service Referral process works in the C-FIRST! system.

Learning Objectives:

- Review a Service Referral
- Review a Service Log

Task 1: Review Service Referrals

1. Click the **Provider** tab from the **Home** dropdown and select the Provider you want to open.
2. Select **Service Requests** hyperlink from the **Related List Quick Links**.
3. Select the **Service Request ID** with Service Type as **Service Referral**.
4. Review the **Service Referral**.



Task 2: Review Service Log

1. Access the **Related List Quick Links** of the Service Referral.
2. Click the **Services Log** hyperlink from the **Related Quick Links** section.
3. Select the **Service Log ID**. The **Service Log Details** screen displays.

4. Access the **Service Information** section and review the information.
5. Review the **Service Log**. **Note:** Once this service log is approved, C-FIRST! auto-generates an invoice. This invoice is sent to Fiscal for payment.

Lesson 2: Manage Funding Requests

This lesson introduces how Fiscal Workers review and complete a Funding Requests within Service Requests.

Learning Objectives:

- Review a Funding Request
- Complete a Funding Request

Note: Funding Request for emergency services and basic needs, which may be paid for by DCS Payment Card (P Card) or a physical check or ETF/Direct Deposit, can be processed using a service request of type **Funding Request**.

Task 1: Review a Funding Request

1. Log in as a Fiscal Worker and click the **Service Request** tab from the **Home** dropdown.
2. Select the **Service Request** hyperlink with the **Request Type** of Funding Request.
3. Verify that the Request Type is set to *Funding Request*.
4. Verify that the **Service Taxonomy ID** matches the service requested.
5. Click the **Person Involved** hyperlink from the **Related List Quick Links** section.
6. Verify that the **Person Involved** records are already created and converted with all required fields populated.
7. Click the **Pencil** icon in the **Primary Child/Youth** field and click in the Search Case Persons box and select the correct Child/Youth. If the Child/Youth is not listed, you can enter the name of the Child/Youth in the field.
8. Scroll down to Provider Information section and click in the Search Provider box in the **Provider (Known)** field and select the Provider from the Recent Items list. If the

Provider is not in the Recent Items list you can enter the name of the Provider.

9. Navigate to the Service Details section and Click in the **Start Date** field. Select the Start Date.
10. Click the **Unit Type** dropdown and select the Unit Type.
11. Click in the **#Units / Hours Authorized** field and enter the amount of hours that have been authorized.
12. Click the **Payment Type** dropdown and select the Payment Type.
13. Click in the **End Date** field. Select the End Date.
14. Click the **Total Amount Authorized** field and enter the authorized amount.
15. Click the **Amount Authorized / Unit** field and enter the amount authorized / unit.
16. Click the **Service County** dropdown field and select the Service County.
17. Click the **Status** field.
18. Select *Completed*.
19. Click **Save**.

Task 2: Complete a Funding Request

1. Log in as a Fiscal Worker and click the **Service Request** tab from the **Home** dropdown.
2. Click the **Service Request** hyperlink with the **Request Type** as *Funding Request*.
3. Verify that the **Status** is set to *Approved*.
4. Review the **Funding Request** details.
5. Click the **Pencil** icon in the **Status** field.
6. Select *Completed*.
7. Click **Save**.



Process Tip!

Update **Status** to *Rejected* when there are concerns following a review.

Knowledge Check!

Question 1: Which type of Service Requests is used for processing Assistance services paid for by DCS Payment Card (P Card) or a physical check or ETF/Direct Deposit?

- A. Allocation Request
- B. Funding Request
- C. Change Request
- D. Assistance Request

Module 5: Payment Processing

In this module, you will learn how Fiscal Workers review and approve invoices for payment using the Invoice List View in C-FIRST!. You'll practice key tasks such as assigning approvers in bulk, exporting invoice records for review, and verifying invoice costs and related transactions. By the end, you'll be able to update invoices to Release for Payment, triggering automatic status updates across the invoice and transaction records.

After completing this module, you will be able to:

- Process Payments

Lesson 1: Payment Processing

This lesson introduces how Fiscal Workers review invoices and move them forward for payment by updating approval details in the Invoice List View. You'll learn how to work from the **Pending Invoice Review** list view, assign an approver in bulk, export invoice records for offline review, validate invoice details (including cost and related transactions), and then update invoices to Release for Payment so the system can advance invoice and transaction statuses.



System Tip!

To create your own list view in **Pending Invoice Review**, start by cloning the Invoice list view. Then rename it, update the filters, columns, and sort order, and save it as your personal view for future use.

Learning Objectives:

- Access the correct invoice list view for pending reviews
- Assign an approver to one or multiple invoices
- Export invoice records
- Verify invoice cost details and related transactions before approval
- Release invoices for payment

Task 1: Approve Invoice for Release for Payment

1. Log in as the Fiscal Worker and navigate to the **Invoice** List View from the **Home** dropdown.
2. Click the check boxes to select the invoices to review in the **Invoice** list view.
3. Double click the pencil icon in one of the rows on the **Approver** column. The **Edit Approver** pop-up displays.
4. Click the **Approver** field and enter the approver.
5. Select the **All # selected records** radio button.
6. Click **Save**.
7. Click the **Generate Report** button to export the Invoice records. The **Report: Invoice** screen displays.
8. Click the **Edit** dropdown and select **Export** to export the selected invoice records to an Excel spreadsheet. The **Export** pop-up displays 2 options:
 - Formatted Report
 - Details Only
9. Click an option and click **Export**. Once exported user will be navigated back to the **Invoice** screen.
10. Click on the **Invoice ID** hyperlink from the list view to open an Invoice record. Verify the details.
11. Verify **Invoice Cost**, **Cost Breakdown** and **Transactions** from the **Related List Quick Links** section.
12. Once the review is complete, navigate back to the **Invoice** screen.
13. Click the check boxes to select the invoices to approve that you just reviewed.
14. Double click the pencil icon in one of the rows on the **Approval Action Status** column. The **Edit Approval Action Status** pop-up displays.
15. Click the **Approval Action Status** dropdown and select **Release for Payment**.
16. Select the **All # selected records** radio button.
17. Click **Save**. C-FIRST! updates the Approval Action Status, Invoice Status, Invoice Cost Status, and Transaction Status to **Release for Payment**.

Knowledge Check!

Question 1: Which action updates multiple invoices' **Approval Action Status** to *Release for Payment*?

- A. Click Generate Report and export as Formatted Report
- B. Double click the pencil icon in the Approval Action Status column, choose Release for Payment, select All # selected records, then Save
- C. Open each Invoice ID hyperlink and manually change the status on the invoice record
- D. Double click the pencil icon in the Approver column and click Save

Module 6: Financial Monitoring

In this module, users will track financial transactions, learn to search transaction histories, and monitor payment processing status.

To see the TennCare Billing you will need to access Tableau for the TennCare Billing report.

After completing this module, you will be able to:

- Track Financial Transactions
- Add a Manual Action
- Create and Edit Client Benefit Accounts
- Make a Transaction Update

Lesson 1: Track Financial Transactions

Transaction search is the process of locating, reviewing, and analyzing records of key activities or financial events within C-FIRST!. These transactions include case updates, service authorizations, placement changes, payments, and other actions recorded as part of a child's case history.

Learning Objectives:

- Search transaction histories
- Use Transaction Search sections to locate matching transaction entries
- Review invoice cost details and cost status
- Review transaction details tied to an invoice
- Add General Ledger details

Task 1: Search Transaction Histories

Users can search for transactions using various filter options to view information such as transactions and amounts by provider, client, dates, or service type.

1. Log in as a Fiscal Worker or Fiscal Director and navigate to the **Transaction Search** tab from the **Homepage**.
2. The **Transaction Search** screen allows users to search for transactions using fields organized into the following sections:
 - Search by Provider
 - Search by TennCare Billing Information

- Search by Records
 - Search by Edison Information
 - Search by Journal Details
3. Click the **arrow** next to the section to expand and perform a search.
 4. Enter desired information in the search criteria.
 5. Click the **Search** button. C-FIRST! will display matching transaction details in the **Transaction Entries** section at the bottom of the screen.

Task 2: Monitor Payment Processing Status

Users can view both the payment issue date and the payment clearing date for payments, as provided by C-FIRST! through the Edison Interface to accurately track the status and timing of payments for reconciliation, reporting, and case management purposes.

1. Log in as a Fiscal Worker and navigate to the **Invoice** tab from the **Homepage**.
2. Review the **Invoice** list view to view and track invoices created through the payment batch process. C-FIRST! automatically assigns a unique number to each payment for easy tracking and identification of specific transactions for reconciliation and reporting purposes.
Note: Invoices cannot be created manually. C-FIRST! generates invoices via batch run.
3. Click the **check boxes** to select multiple invoices.
4. Click the **Edit** hyperlink to update the Invoice Status of multiple invoices at one time. **Note:** The Locked columns will be marked with a **Lock** icon. The **Edit** pop-up displays.
5. Edit the **Approver** and **Approval Action Status** fields.
6. Click **Save**.



Process Tip!

Invoices with an **Invoice Status** of *Edison Error* need to be resubmitted as a new record. Users must use the same Edison PO Number but with unused suffix letter added to the end.

Task 3: Review Invoice Cost

Now let's view and track invoice costs created through the payment batch process, detailing the financial breakdown associated with the invoice.

1. Log in as a Fiscal Worker and navigate to the **Invoice** tab from the **Homepage**.
2. Click the **Invoice ID** from the list view.
3. Click the **Invoice Costs** hyperlink from the Related Lists Quick Links section.
4. Review the Invoice Costs list view for details about the Cost Status, Invoice Type, Cost Amount, Billing dates etc.
5. Click the **Invoice Cost ID** hyperlink to open a record. The invoice records are created through the payment batch logic. The fields on the screen are read-only.

Task 4: Review Transaction Details

Let's view and track transactions created through the payment batch process, detailing the financial breakdown associated with the invoice and invoice cost.

1. Log in as a Fiscal Worker and navigate to the **Invoice** tab from the **Homepage**.
2. Click the **Invoice ID** from the list view.
3. Click the **Transactions** hyperlink from the **Related Lists Quick Links** section.
4. Review the **Transactions** list view for the Transaction Status, Transaction Type, the Transaction Amount etc.
5. Click the **Transaction ID** hyperlink to open the transaction record.
6. Review the transaction information in the different tabs; **Details, Edison Information, TennCare & GL, and Client Account**.

Task 5: Adding General Ledger Details

1. Navigate to the **Transaction Search** tab from the **Homepage**.
2. Select **Invoice** from the **Record Selection** dropdown.
3. Click the **Record ID** field and enter the **Record ID**.
4. Alternatively, click **Record Status** dropdown and select *Pending*.

5. Click **Search**. The records matching the search criteria is displayed at the bottom.
 6. Select the **GL Transaction Records** to be released.
 7. Scroll down and click the **Add GL** button.
 8. Click the **GL Activity Type** dropdown and select an option.
 9. Enter the **GL Journal ID**.
 10. Enter today's date in the **GL Journal Date** field.
 11. Click the **GL Journal Status** dropdown and select **Release to Edison**.
 12. Click the **Source** dropdown and select **RA (Accrued Revenue)**.
 13. Enter details in the **Long Description** field.
 14. Click **Save GL**.
 15. Click on the **TennCare & GL** tab of the transaction record and verify that the GL information has been populated.
- Note:** General Ledger (GL) transactions should only be created once the PCard transaction has reached an *Approved* status. No GLs should be generated while the transaction is still pending approval.

Lesson 2: Add a Manual Action

In this lesson, you will learn how to manually add an action in C-FIRST! when payment corrections are needed outside of the standard batch process. When a payment is incorrectly applied or a balance needs to be corrected, Fiscal Workers can use the Manual Actions feature to record Edison Collections, Manual Collections, or Write-Offs directly against an Account Receivable. Understanding this process ensures that receivable balances remain accurate and that any discrepancies are documented and resolved in a timely manner.

Learning Objectives:

- Manually Add a Collection or Write-Off

Task 1: Manually Add Collection or Write-Off

1. Navigate to the **Account Receivables** tab from the **Homepage**.
2. Select the **Account Receivable ID** hyperlink and the **Account Receivables** screen is displayed.
3. Select the **Manual Actions** hyperlink from the **Related List Quick Links**.

4. Select the **New** button and the **New Manual Action** screen is displayed.
5. Click the **Accounting Date** and enter the date.
6. Click the **Manual Action Type** dropdown and select Edison Collection as the Manual Action Type. The Manual Action Type options are:
 - Edison Collection
 - Manual Collection
 - Write-Off



System Tip!

The required fields change based on the Manual Action Type that is selected.

7. Enter the amount that you are adjusting in the **Manual Action Amount** field.
8. Navigate to the **Edison Collection Information** section.
9. Click in the **Payment Date** field and select the Payment Date.
10. Click in the **Warrant Number** field and enter the Warrant Number.
11. Click in the **AP Voucher** field and enter the AP Voucher.
12. Click in the **Edison Invoice Number** field and enter the Edison Invoice Number.
13. Click **Save**.

Lesson 3: Client Benefit Accounts

In this lesson, you will learn how to create and manage Client Benefit Accounts in C-FIRST!, which are used to track benefit payments received on behalf of children in DCS care. These accounts capture benefit types such as SSI, SSA, VA Benefits, and Child Support, and record the associated transactions that affect a child's account balance. You will also learn how to handle Treasury errors that arise when benefit payment records cannot be automatically matched to a client, ensuring that all benefit funds are accurately applied and accounted for.

Learning Objectives:

- Create a New Client Benefit Account
- Add a Client Benefit Check
- Treasury Errors

Task 1: Creating a New Client Benefit Account

1. Navigate to the **Client Account Statements** tab from the **Homepage**.
2. Click the **Client Account Statement ID** hyperlink on the Client Account Statements list view. The **Client Account Statement** record screen displays.
3. Click the **Client Accounts** hyperlink from the **Related List Quick Links** section. The **Client Accounts** list view displays.
4. Click **New** to create a new Client Account. The **New Client Account** screen displays.
5. Click on the **Account Status** dropdown and select Open.
6. Click the **Claim #** field and enter the Claim number.
7. Click the **Benefit Type** dropdown and select the Benefit Type. The dropdown options are:
 - Black Lung
 - Railroad
 - SSA – Title II
 - SSI – Dedicated
 - SSI – Lumpsum
 - SSI – Out of State Supplemental
 - SSI – Regular
 - VA Benefits
 - Child Support
8. Click the **Client Account Source** dropdown and select the Client Account Source. The dropdown options are:
 - Finance Process Batch
 - Manual
 - Treasury
9. Click the **Start Date** field and select the Start Date
10. Click the **End Date** field and select the End Date.
11. Click **Save**.

Task 2: Add a Client Benefit Check

1. Navigate to the **Transaction Search** tab from the **Homepage**.
2. Click the **New** button at the bottom of the page.
3. Click on the **Transaction Type** dropdown and select Client Benefits – Benefit (Check). The other dropdown options are:
 - Placement
 - Case Agreement
 - Service Referral
 - Funding Request
 - Client Benefits AP
 - Placement – Receivable
 - Case Agreement – Receivable
 - Payment Adjustment GL
 - Payment Adjustment State
 - Funding Adjustment GL
 - TennCare Adjustment
 - Client Benefits -Benefits Transfer
 - Client Benefits – Funding
 - Client Benefits – Funding GL
 - Client Benefits – Interest
 - Client Benefits – Interest GL
 - Client Benefits – LumpSum Transfer
 - Client Benefits – Refund
 - Client Benefits – ABLE
 - Client Benefits – Account Closure
 - Client Benefits – Benefit (ACH)
 - Client Benefits – Child Support
 - Collections
 - Net Adjustments
 - Pcard
 - Pcard GL
 - Income
4. Click the **Transaction Status** dropdown and Select *Paid*. The other Transaction Status options are:
 - Abridged
 - Abridged – Reprocessed
 - Canceled
 - Canceled – Reprocessed

- Deleted
 - Deleted – Reprocessed
 - Denied
 - Denied – Reprocessed
 - Edison Error
 - Hold
 - Paid
 - Pending
 - Redeemed
 - Release for Edison
 - Release for Payment
 - Review in Progress
 - Sent to Edison
 - Stop
5. Click the **Transaction Amount** field and enter the Transaction Amount.
 6. Navigate down to the **Client Information** Section and click the **Client Name** field and start Typing in the Client Name. A list of Client Names should display. Select the desired Client Name.
 7. Navigate to the **Check Information** section and click the **Check Number** field and enter the correct check number.
 8. Click the **Payee Name** field and enter the payee name.
 9. Click the **Deposit Date** field and enter the date.
 10. Navigate down to the **Navigation Links** section and click the **Client Account ID** field and enter the Client Account ID.
Note: The Client Account ID can be found on the Client Account Statement.
 11. Click **Save**.



System Tip!

The Client ID, Date of Birth, and age should auto populate in the Client Information section after the Transaction is saved.

Task 3: Treasury Benefits Payments - Treasury Errors

1. Click on the **App Launcher** and select View All.
2. Click on the **Interface Errors** hyperlink. The **Interface Errors** list view displays.

3. Click on the **Recent List Views** dropdown and select **Treasury**.
The other **Recent List Views** dropdown options are:
 - Edison
 - Edison Errors
 - Recently Viewed (Pinned List)
 - All
4. Select the **Treasury Error ID** hyperlink you need to update.
5. Select the pencil icon from the **Name** field and Click in the Search person field. Began typing the Name of the correct person and select the Person Name when it displays.
Note: If the person does not exist in C-FIRST! you will need to select add a New Person from the Person Search List.
6. Select **Return Check?** Checkbox if the benefit needs to be returned.
7. Click **Save**.
8. Verify that the **Status** field has been updated to Completed.
9. Navigate to the Client Account Statement and verify that the Treasury Error record **Status** is completed.
10. Verify that the Interface Transaction **Status** is marked as Success.
11. Navigate to **Client Accounts** Related List and select the **Client Account Transaction** hyperlink and verify that Benefit Account has been created.
12. Navigate to the **Financial Transaction** from Client Account Transaction screen by using **Transaction ID** hyperlink and verify that a Financial Transaction Client Account – Benefit (ACH) has been created.
13. If **Return Check?** Navigate to **Client Accounts** Related List and select the **Client Account Transaction** hyperlink and verify that Benefit Refund has been created.
14. Navigate to Financial Transaction by selecting **Transaction ID** hyperlink from Benefit Refund **Client Account Transaction**
15. Verify that the Financial Transaction **Status** is set to Pending.
16. Verify that the **Transaction Type** is set to Client Benefits – Refund.

Lesson 4: Transaction Updates

In this lesson, you will learn how to modify and mass-update financial transaction records in C-FIRST! when corrections are needed after a transaction has been created.

Learning Objectives:

- Modify a Transaction
- Mass Updates on a Transaction

Task 1: Modify a Transaction

1. Navigate to the **Transaction Search** tab from the **Homepage**.
2. From the **Search by Records** section and click the **Record Selection** field and select Invoice.
3. Click the **Record ID** field and enter the Invoice ID.
4. Click **Search**.
5. Select the Invoice you want to modify.
6. Click the **Modify Transaction** button.
7. Select the field that you want to modify.
8. Enter the changes you want to make.
9. Click the **Save All Changes** button.



System Tip!

Click the Field Group dropdown to select different Transaction fields.

Task 2: Mass Updates on a Transaction

1. Navigate to the **Transaction Search** tab from the **Homepage**.
2. From the **Search by Records** section, click the **Record Selection** field and select Invoice.
3. Click the **Record ID** field and enter the Invoice ID.
4. Click **Search**.
5. Select all the Invoices you want to modify.
6. Click the **Mass Change** button.
7. Select the field that you want to modify.
8. Enter the changes you want to make.

9. Click the **Mass Change** button.

Knowledge Check!

Question 1: When resubmitting an invoice with *Invoice Status* as Edison Error as a new record, how should the Edison PO Number be entered?

- A. Use a new Edison PO Number with a different numeric sequence
- B. Use the same Edison PO Number and append with an unused suffix letter to the end
- C. Use the same Edison PO Number and prepend append with an unused suffix letter to the beginning
- D. Use the same Edison PO Number with **-RESUB** added at the end

Question 2: When adding a Manual Action in C-FIRST!, which of the following is NOT one of the three Manual Action Types you can choose?

- A. Edison Collection
- B. Manual Collection
- C. Write-Off
- D. Treasury Refund

Question 3: In Lesson 4 you learned that you could update multiple transaction records at one time instead of one by one. What is the name of the button you click to make those changes?

- A. Modify Transaction
- B. Save All Changes
- C. Mass Change
- D. Bulk Update

Module 7: Supervisor-Specific Functions

Supervisor-specific functions in C-FIRST! provide oversight tools beyond what frontline workers access. Supervisors support workers by approving work items requiring supervisory approval. These functions ensure supervisory accountability and support timely fiscal progression.

After completing this module, you will be able to:

- Submit records for supervisor approval
- Approve submitted records
- Review Batch Management
- View and configure Funding Source Maintenance
- Access Tableau

Lesson 1: Approval Process for a Provider Agreement

C-FIRST! supports a supervisory approval process for Provider Agreement records. Users submit records for approval, and supervisors can approve, reject, or reassign those records while capturing comments throughout the process.

Learning Objectives:

- Submit a Provider Agreement for supervisor approval with comments
- Locate approval tasks using Items to Approve or notifications
- Approve a submitted Provider Agreement and record feedback
- Reject a submitted Provider Agreement and provide required comments
- Reassign an approval task to another supervisor with justification
- Review Approval History to confirm prior approval actions
- Export Transaction Search results for reporting and follow-up tasks

Task 1: Submit a Provider Agreement for Supervisor Approval

Submit the Provider Agreement to your Supervisor for review and approval.

1. Navigate to the **Provider Agreement** record in the *Finalized* status for the record you want to **Submit**. C-FIRST! displays the agreement details.
2. Locate the **Submit for Approval** button in the top right corner of the screen.
3. Click **Submit for Approval**. C-FIRST! displays the **Submit for Approval** pop-up.
4. Enter any comments in the **Comments** field to provide context for the approver.
5. Click **Submit**. C-FIRST! submits the record and creates an entry in the **Items to Approve** dashboard of the assigned approver.



Process Tip!

After submission, the assigned approver receives the record in their **Items to Approve** dashboard. Click **Cancel** instead of **Submit** to exit without submitting the record.

Task 2: Approve a Submitted Record

As a supervisor, you received the Provider Agreement approval task. After reviewing the Provider Agreement details, approve the record.

1. Navigate to the record from the **Items to Approve** dashboard or from the **Bell Notification** icon. C-FIRST! displays the record details.
2. Click **Approve** on the list view. C-FIRST! displays the **Approve** pop-up.
3. Enter any comments in the **Comments** field to document your feedback.
4. Click **Approve** in the **Approve** pop-up. C-FIRST! approves the record and updates the **Approval Status**



Process Tip!

After approval, the owner of the record receives a bell notification confirming that the record was approved. C-FIRST! also updates the **Approval History** list view with the step name, date, status, and any comments entered.

Task 3: Reject a Submitted Record

As a supervisor, you received the Provider Agreement approval task. After reviewing the Provider Agreement details, return it to the provider worker for edits.

1. Navigate to the record from the **Items to Approve** dashboard or from the **Bell Notification** icon. C-FIRST! displays the record details.
2. Click **Approval History** in the **Related List Quick Links** section. C-FIRST! scrolls to the **Approval History** list view.
3. Click **Reject** on the list view. C-FIRST! displays the **Reject** pop-up.
4. Enter comments in the **Comments** field explaining why the record is being returned. Comments are required for rejection.
5. Click **Reject** in the **Reject** pop-up. C-FIRST! rejects the record and updates the **Approval Status**.



Process Tip!

After rejection, the record owner receives a bell notification that the record was returned. C-FIRST! also generates a task for the record owner to complete the returned record.

Task 4: Reassign a Submitted Record to Another User

As a Supervisor, you received a Provider Agreement for approval but you need another supervisor to review it. Reassign the agreement to a different user.

1. Navigate to the record from the **Items to Approve** dashboard or from the **Bell Notification** icon. C-FIRST! displays the record details.
2. Click **Approval History** in the **Related List Quick Links** section. C-FIRST! scrolls to the **Approval History** list view.
3. Click **Reassign** on the list view. C-FIRST! displays the **Reassign Plan** pop-up.
4. Enter the user who will receive the approval in the **Reassign To** field. This field is required.

5. Enter comments in the **Comments** field explaining the reason for reassignment. Comments are required.
6. Click **Reassign** in the **Reassign** pop-up. C-FIRST! reassigns the record to the specified user.



System Tip!

The **Reassign To** field is only visible on the **Reassign** pop-up. It does not display on the Approve or Reject pop-ups.



Process Tip!

After reassignment, the new assignee receives a bell notification that the record was reassigned to them. C-FIRST! updates the **Approval History** list view with the reassignment details.

Task 5: Review the Approval History for a Provider Agreement

Review the approval history for the Provider Agreement to verify past approval actions taken by supervisors.

1. Navigate to an existing Provider record and click the **Agreements** hyperlink from the **Related List Quick Links** section.
2. Select the relevant **Agreement ID** hyperlink from the list view. The Agreement screen displays.
3. Click the **Approval History** hyperlink from the **Related List Quick Links** section to view the details.
4. Click the hyperlink in the **Step Name** column to view details for a specific approval step. C-FIRST! displays the selected approval record.



System Tip!

All fields in the **Approval History** list view are auto populated and not editable by users. The **Status** field reflects the current state of each approval step.



Process Tip!

C-FIRST! updates the **Approval History** list view each time an approval action occurs, including submissions, approvals, rejections, and reassignments.

Task 6: Export Results from Transaction Search

Supervisors can access and view Fiscal reports in the visual analytics platform called Tableau. Tableau reads the data in C-FIRST! through the data warehouse to generate these reports. These reports are all refreshed daily and the user who is subscribed to the reports will be able to see a snapshot of the report every day on Tableau.

1. Log in as a Fiscal Worker or Fiscal Director and navigate to the **Transaction Search** tab from the **Homepage**.
2. Enter desired information in the search criteria.
3. Click the **Search** button. C-FIRST! will display matching transaction details in the **Transaction Entries** section at the bottom of the screen.
4. Click the **check box** to select multiple entries.
5. Scroll down to the bottom of the screen and click the **Export** button. The records are exported to an excel sheet.

Lesson 2: Batch Management

This lesson introduces Batch Management activities performed by the Fiscal Director to monitor batch processing and validate batch outputs before final payment actions occur. You'll learn how to navigate to a Batch record, interpret key batch run and status fields, review the invoices tied to the batch (including service taxonomy and provider details), and initiate and verify a Trial Run to confirm that trial invoices, costs, and transactions are generated as expected.

Learning Objectives:

- Access and interpret Batch records and key run/status fields
- Review batch-linked invoices and confirm critical invoice attributes
- Validate service taxonomy and payment rate details from an invoice

- Confirm provider and Edison supplier information tied to batch invoices
- Execute a trial batch run and verify successful creation of trial invoices, costs, and transactions

Task 1: Review Batch Screen and Provider Information

1. Log in as Fiscal Director and navigate to the **Batch** screen from the **App Launcher** by typing **Batch**. The **Recently Viewed Batch** list view displays the following fields:
 - Batch ID
 - Batch Run Type
 - Batch Run Start Date
 - Batch Run End Date
 - Batch Status
 - Last Trial Run Date
 - Last Trial Run Status
 - Final Batch Run Date
 - Final Batch Run Status
2. Click on the **Batch ID** hyperlink for the relevant record type to navigate to the record. The **Details** screen displays.
3. Review the following fields in the **Information** section:
 - Batch ID
 - Batch Run Type
 - Reimbursability Batch Run Type
 - Batch Status
 - Batch Run Start Date
 - Batch Run End Date
 - Actual Batch Run Date
4. Review the following fields in the **Batch Run Information** section:
 - Last Trial Run Status
 - Last Trial Run Date
 - Exception Report
 - Final Batch Run Status
 - Final Batch Run Date
5. Click on **Invoice** hyperlink on the **Related List Quick Links** section. The **Invoice** list displays the following fields:
 - Invoice ID
 - Origin Code

- Invoice Status
 - Service Taxonomy ID
 - Provider ID
 - Edison Supplier ID
 - Edison Supplier Name
 - Invoice Amount
 - Billing Start Date
 - Billing End Date
6. Click on the **Invoice ID** to view the details of the **Service Taxonomy and the Provider Information**.
 7. The **Service Information** displays the following fields:
 - Service Taxonomy
 - Level 1 Service
 - Level 2 Service
 - Level 3 Service
 - Payment Rate Type
 - Rate Amount
 - Origin Code
 8. The **Provider Information** section displays the following fields:
 - Provider Name
 - Provider ID
 - Provider Agreement
 - Contract ID
 - Delegated Authority Number
 - Edison Supplier Name
 - Edison Supplier ID
 - Edison Supplier Location
 - Edison Supplier Address Sequence Number
 - Edison Supplier Remittance Address

Task 2: Verify Trial Batch Run

1. Log in as the Fiscal Director and click the **Batch** tab from the **Home** dropdown.
2. Click the Service Referral batch from the Batch list view.
3. Click the **Trial Run** button. C-FIRST! will send a notification confirming initiation.
4. Verify that the **Last Trial Run Status** and **Last Trial Run Date** fields are updated.

5. Click the **Trial Invoice** hyperlink from the Related List Quick Links section.
6. Verify new trial invoice records appear in the **Trial Invoice** list view.
7. Verify new trial cost records appear in the **Trial Cost** related list.
8. Verify new trial transaction records appear in the **Trial Transaction** related list.

Lesson 3: Funding Source Maintenance

In this lesson, you will learn how to properly track, allocate, and monitor funding resources. It also allows the Fiscal Directors to track available balances against initial funding amounts. You will also be able to override financial transactions when funding is incorrectly captured on the payment transaction.

Learning Objectives:

- View active and inactive Funding Source Maintenance records
- Create a Funding Source Maintenance record with required dates and status
- Identify and enter Project ID information for a funding source
- Create Funding Source Transactions (credit/debit) with key details
- Confirm the Fund Source Available Balance updates after transactions

Task 1: View Funding Source Maintenance

1. To view the list of Funding Source Maintenance records, Log in as the Fiscal Director and click the **Funding Source Maintenance** tab from the **Home** dropdown.
2. Review the **Funding Source Maintenance** list view for all the active as well as inactive records.
3. Review the list of records that have been entered in C-FIRST! for defining rates across services.

Task 2: Configure a Funding Source Maintenance Record

1. Click **New** from the **Funding Source Maintenance** list view.
2. Enter a funding source category in the **Funding Source** field.

3. Enter the **Funding Source Start Date**.
4. Enter the **Funding Source End Date**, if known.
5. Enter the date this funding source expires regardless of the status in the **Expiration Accounting Date** field.
6. Select **Status** of the funding source record as *Active*. The **Fund Source Available Balance** is recorded at \$0.00 and system generated.
7. Select if the date is accounting or service date **Date Specific**.
8. Select if the funding source is for **Custody/Non-Custody**.
9. Navigate to the **Project ID Information** section.
10. Enter the **Project ID 1**. If there are additional Project IDs, users can enter it in **Project ID 2** and **Project ID 3** fields.
11. Click **Save**. The record displays **Funding Source Maintenance Hierarchy History** related lists that maintains a chronological record of all actions taken on this record.

Lesson 4: Access Tableau

As a supervisor, you have access to certain reports within Tableau. The Tableau Homepage has a list of reports with the respective categories and links to access them.

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.

- Accessing Tableau Reports
- Filtering Reports
- Downloading Reports

Task 1: Accessing Tableau Reports

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

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

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

Report Category	Serial Num.	Report Category	Report Name	Report Description	Report Link
(All)	1	Regional Operations	Non-Custody Open Case Age	The Non-Custody Open Case Age report is designed to provide a compreh...	Link
☒ Bias Analysis	2	Regional Operations	Administrative Review Consultation	The Administrative Review/Consultation report is designed to track time...	Link
☒ Bias Analysis (CP)	3	Regional Operations	Resource Linkage Time Open	The Resource Linkage Time Open report is designed to assess the number...	Link
☒ Bias Analysis (OCS)	4	Regional Operations	Case Load Report	The Case Load report is designed to monitor and track caseload and metr...	Link
☒ Data Quality	5	Statewide Services	CFTM Report	The Child and Family Team Meeting (CFTM) report is designed to monitor...	Link
☒ Fiscal	6	Regional Operations	Activity Management	The Activity Management report is designed to capture caseload cases, a...	Link
☒ Health & Education	7	Regional Operations	Diversion Report	The Diversion report is a comprehensive tool designed to capture and mo...	Link
☒ ICPC	8	Legal	Legal Status Report	The Legal Status report is designed to list all legal petitions within the sy...	Link
☒ Independent Living	9	Regional Operations	FSS/FCIP Time Open	The FSS/FCIP Time Open report is designed to track the timeliness of Fa...	Link
☒ Legal	10	Regional Operations	Diligent Search Report	The Diligent Search report is designed to capture and track the diligent s...	Link
☒ Placement	11	Regional Operations	Parent Child Visit Summary and Detail Report	The Parent Child Visit Summary and Detail report is designed to capture...	Link
☒ Quality Compliance	12	Statewide Services	Data Needed NOA (Notice of Action)	The Data Needed NOA (Notice of Action) Report is designed to provide a...	Link
☒ Regional Operations	13	ICPC	ICPC Referral Data Submission Timeliness Report	The ICPC Progress report is designed to monitor the progress of ICPC pla...	Link
☒ Statewide Services	14	Statewide Services	Foster Home Mega	The Foster Home Mega report is essential for federal reporting and outli...	Link
	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	Wildier Monthly BCM Contacts Report	The Wildier Monthly BCM Contacts report is designed to track all the you...	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 RAST Report	The Safety/RAST 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.

TN Department of Children's Services **Intake Report** Data as of: 5/5/2026 2:04:53 PM

GLOBAL FILTERS

RESET

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

Region: Midwest Region

County: (All)

Download Excel

Region	Supervisor	Initial Intake Worker	Intake Worker Disposition Track	Intake Worker Disposition Priority	County	ZIP Code
Midwest Region	Null	Intake Supervisor	Null	Null	Blount	Null
Midwest Region	Null	Ns2 Testuser	Null	Null	Anderson	38464
Midwest Region	Child Program Super	Gaurav Kumar	Null	Null	Dickson	38012
Midwest Region	CPS Supervisor	Intake Supervisor	Null	Null	Bedford	Null
Midwest Region	CPS Supervisor	Intake Supervisor	Null	Null	Blount	Null
Midwest Region	Cps Supervisor	Gaurav Kumar	Null	Null	Carroll	99999
Midwest Region	Cps Supervisor	Gaurav Kumar	Null	Null	Chester	Null
Midwest Region	Cps Supervisor	Intake Supervisor	Null	Null	Benton	Null
Midwest Region	Cps Supervisor	Intake Supervisor	Null	Null	Benton	Null
Midwest Region	Cps Supervisor	Intake Supervisor	Null	Null	Chester	38464
Midwest Region	Cps Supervisor	Intake Supervisor	OUT OF STATE COURTESY	Null	Benton	Null
Midwest Region	Cps Supervisor	Intake Supervisor	SIU INVESTIGATION	Null	Carroll	Null
Midwest Region	Cps Supervisor	Ns1 Testuser	Null	Null	Benton	Null
Midwest Region	Cps Supervisor	Ns1 Testuser	Null	Null	Benton	38464
Midwest Region	Cps Supervisor	Ns1 Testuser	Null	Null	Benton	38464
Midwest Region	Cps Supervisor	Ns1 Testuser	Null	Null	Benton	96543
Midwest Region	Cps Supervisor	Ns1 Testuser	Null	Null	Cheatham	38464
Midwest Region	Cps Supervisor	Ns1 Testuser	Null	Null	Carroll	38464
Midwest Region	Cps Supervisor	Ns1 Testuser	OUT OF STATE COURTESY	Null	Decatur	38464
Midwest Region	Cps Supervisor	Ns2 Testuser	Null	Null	Benton	Null
Midwest Region	Cps Supervisor	Ns2 Testuser	Null	Null	Benton	Null
Midwest Region	Cps Supervisor	Ns2 Testuser	Null	Null	Chester	Null
Midwest Region	Cps Supervisor 1	Intake Supervisor 1	Null	Null	Benton	Null
Midwest Region	Cps Supervisor 2	Intake Supervisor 1	Null	Null	Cheatham	Null
Midwest Region	Cps Supervisor 3	Intake Supervisor 1	Null	Null	Chester	Null

- Another feature to note is the cascading filter functionality, meaning if you select a certain filter, the other filters will only show relevant values applicable to the already selected filter. For example, in the screenshot we can see that we selected *Midwest Region* as the **Region**, so only the counties coming under that region are displayed, as shown in the screenshot below.

TN Department of Children's Services **Intake Report** Data as of: 5/5/2026 2:04:53 PM

GLOBAL FILTERS

RESET

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

Region: Midwest Region

County: (All)

Download Excel

Region	Supervisor	Initial Intake Worker	Intake Worker Disposition Track	Intake Worker Disposition Priority	County	ZIP Code
Midwest Region	Null	Intake Supervisor	Null	Null	Blount	Null
Midwest Region	Null	Ns2 Testuser	Null	Null	Anderson	38464
Midwest Region	Child Program Super	Gaurav Kumar	Null	Null	Dickson	38012
Midwest Region	CPS Supervisor	Intake Supervisor	Null	Null	Bedford	Null
Midwest Region	CPS Supervisor	Intake Supervisor	Null	Null	Blount	Null
Midwest Region	Cps Supervisor	Gaurav Kumar	Null	Null	Carroll	99999
Midwest Region	Cps Supervisor	Gaurav Kumar	Null	Null	Chester	Null
Midwest Region	Cps Supervisor	Intake Supervisor	Null	Null	Benton	Null
Midwest Region	Cps Supervisor	Intake Supervisor	Null	Null	Benton	Null
Midwest Region	Cps Supervisor	Intake Supervisor	Null	Null	Chester	38464
Midwest Region	Cps Supervisor	Intake Supervisor	OUT OF STATE COURTESY	Null	Benton	Null
Midwest Region	Cps Supervisor	Intake Supervisor	SIU INVESTIGATION	Null	Carroll	Null
Midwest Region	Cps Supervisor	Ns1 Testuser	Null	Null	Benton	Null
Midwest Region	Cps Supervisor	Ns1 Testuser	Null	Null	Benton	38464
Midwest Region	Cps Supervisor	Ns1 Testuser	Null	Null	Benton	38464
Midwest Region	Cps Supervisor	Ns1 Testuser	Null	Null	Benton	96543
Midwest Region	Cps Supervisor	Ns1 Testuser	Null	Null	Cheatham	38464
Midwest Region	Cps Supervisor	Ns1 Testuser	Null	PRIORITY 1	Carroll	38464
Midwest Region	Cps Supervisor	Ns1 Testuser	OUT OF STATE COURTESY	Null	Decatur	38464
Midwest Region	Cps Supervisor	Ns2 Testuser	Null	Null	Benton	Null
Midwest Region	Cps Supervisor	Ns2 Testuser	Null	Null	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 on **Download**.

Download Crosstab

Select a sheet from this dashboard

☒ Activity Management Table

☐ Average Caseload Per Assigned Worker by Region

Select Format

☒ Excel ☐ CSV

Download

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

Knowledge Check!

Question 1: After clicking *Submit for Approval*, what happens when you click *Submit* in the pop-up?

- A. The record is approved immediately and removed from the queue
- B. The record is submitted and an entry is created in the assigned approver's Items to Approve dashboard
- C. The record is reassigned to another supervisor automatically

- D. The record is rejected and a task is generated for the owner

Question 2: What is unique to the *Reassign* pop-up (not shown on Approve/Reject pop-ups)?

- A. The Comments field
- B. The Approve button
- C. The Reassign To field
- D. The Approval History hyperlink

Question 3: Which statement is true when rejecting a submitted Provider Agreement?

- A. Comments are optional and can be left blank
- B. You must open the Agreement ID from the Agreements hyperlink first
- C. Rejection updates Approval History, but no notification is sent
- D. Comments are required and should explain why the record is being returned

Glossary

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

Term	Definition
Case Person Detail	Screen name for viewing person information within a case context rather than Person Detail screen
Case Summary	Tab on Investigation Record providing high-level overview of case status, assessments, placements, interactions, and court orders
CCWIS	Comprehensive Child Welfare Information System
C-FIRST!	Child and Family Information, Records System Tracking (C-FIRST!) is Tennessee's CCWIS platform built on Salesforce
Decisions Tab	Tab containing Investigation Disposition checklists, content varies by case subtype
Homepage	The main landing page in C-FIRST! that displays widgets and other workload management tools
Funding Request	A request for approval or authorization to use funds to pay for a needed service, support, or resource.
List View	Standard/default list views cannot be filtered directly; must be cloned first to enable filtering controls
Navigation Bar	The horizontal menu at the top of the C-FIRST! interface with quick access to Home, Cases, Persons, Court Orders, and Reports
PID	Personal Identification number which is a unique identifier automatically assigned to each person record in C-FIRST!

Term	Definition
Related List	A section on a C-FIRST! record page that displays associated like Persons Involved, Court Orders, Placements, Case Documentation, and Staff Involved
Service Referral	A request to connect an individual or family to a service or provider that can meet an identified need.
Utility Bar	A toolbar at the top of the C-FIRST! interface with quick access to help resources, user information etc.