



C-FIRST! Training

Interstate Compact on the Placement
of Children (ICPC) Learner Guide

Tennessee Department of Children's Services



ICPC Course Learner Agenda

Day 1

Introduction

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

Morning Break

Module 1: ICPC Process

Lesson	Task
Lesson 1: ICPC Send Process	• Task 1: Outgoing (Send) process
Lesson 2: ICPC Receive Process	• Task 1: Incoming (Receive) process

Module 2: Request Send Process

Lesson	Task
Lesson 1: Sending ICPC Requests	• Task 1: Access the IC Request List View from a Case • Task 2: Review General Information • Task 3: Review Services Request Information • Task 4: Review the Home Study and Financial/Medical Plan Information • Task 5: Creating the ICPC Case • Task 6: Establish an Existing Person • Task 7: Create an IC Case
Lesson 2: Managing Transmittals for Send	• Task 1: Review the Transmittal List View • Task 2: Create a New Transmittal • Task 3: Send a Transmittal to NEICE
Lesson 3: Receive Home Study Response from the Other State	• Task 1: Review the Home Study Response

Lesson	Task
Lesson 4: Placement Decision Made	- Task 1: Create a task to the ICPC Administrator to notify the placement of the child - Task 2: ICPC Administrator updated the Placement Status section of the Persons/Organizations Involved record - Task 3: Create Transmittal to send 100B Placement Decision to the Receiving State
Lesson 5: Receiving Progress Report	Task 1: Transmittal Notification
Lesson 6: ICPC Case Closure for Sending	Task 1: Close an ICPC Case for Sending

Module 3: Request Receive Process

Lesson	Task
Lesson 1: Receiving and Reviewing Requests	- Task 1: Assign Incoming ICPC Referral - Task 2: Review the Transmittals List View - Task 3: Review a Received Transmittal - Task 4: Establish an Existing Person - Task 5: Navigate to the IC Request List View - Task 6: Review Auto Populated Fields and Submit the ICPC IC Request Received - Task 7: Assign a Home Study Owner and Update the Request Status - Task 8: Complete the Preliminary Home Study Response - Task 9: Complete the Final Home Study Response
Lesson 2: Sending Home Study Response to the other State	- Task 1: Review Home Study and Sign and Upload 100A - Task 2: Create a New Transmittal - Task 3: Send a Transmittal to NEICE - Task 4: Review an Unsuccessful NEICE Transmittal
Lesson 3: Receiving 100B Placement Decision from Sending State	- Task 1: Reviewing the Placement Decision Transmittal - Task 2: Assign a Child Program Supervisor to the Treatment Case - Task 3: Case Manager Supervises Case and Completes Progress Report - Task 4: Create a Transmittal for Progress Report

Lesson	Task
Lesson 4: ICPC Case Closure for Receiving	- Task 1: ICPC Public Agency & CJO Case Closure (Excluding Reg 4) - Task 2: Reg and 4 Case Closure

Module 4: Cases Manually Initiated by ICPC Administrators

Lesson	Task
Lesson 1: Create a Manual IC Request	- Task 1: Access the IC Request List View from a Case - Task 2: Enter General Information - Task 3: Add Services Request Information - Task 4: Complete the Home Study and Financial/Medical Plan Request Information - Task 5: Add Persons Involved - Task 6: Add Associated Attachments

Wrap-Up

Table of Contents

Introduction	5
Let's Dive In	5
Case Scenario: The Milner Family	6
What to Expect	6
Your Role	6
Course Objectives	7
Icons Used Throughout the Course	7
Module 1: ICPC Process	8
Lesson 1: ICPC Send Process.....	8
Task 1: Outgoing (Send) process.....	8
Lesson 2: ICPC Receive Process	10
Task 1: Incoming (Receive) process	10
Knowledge Check!.....	12
Module 2: Request Send Process.....	13
Lesson 1: Sending ICPC Requests.....	13
Task 1: Access the IC Request List View from a Case	13
Task 2: Review General Information	14
Task 3: Review Services Request Information.....	15
Task 4: Review the Home Study and Financial/Medical Plan Request Information.....	16
Task 5: Creating the ICPC Case.....	16
Task 6: Establish an Existing Person.....	17
Task 7: Create an IC Case	17
Lesson 2: Managing Transmittals for Request Send.....	18
Task 1: Review the Transmittals List View	18
Task 2: Create a New Transmittal	19
Task 3: Send a Transmittal to NEICE.....	21
Lesson 3: Receive Home Study Response from the other State	21
Task 1: Review the Home Study Response.....	21
Lesson 4: Placement Decision Made.....	22

Task 1: Create a task to the ICPC Administrator to notify the placement of the child	22
Task 2: ICPC Administrator updates the Placement Status section of the Persons/Organizations Involved record	23
Task 3: Create Transmittal to send 100B Placement Decision to the Receiving State	23
Lesson 5: Receiving Progress Report	23
Task 1: Transmittal Notification	23
Lesson 6: ICPC Case Closure for Sending	23
Task 1: Close an ICPC Case for Sending	23
Knowledge Check!.....	24
Module 3: Request Receive Process	25
Lesson 1: Receiving and Reviewing Requests	25
Task 1: Assign Incoming ICPC Referral	25
Task 2: Review the Transmittals List View	26
Task 3: Review a Received Transmittal.....	27
Task 4: Establish an Existing Person.....	28
Task 5: Navigate to the IC Request List View	28
Task 6: Review Auto Populated Fields and Submit the ICPC IC Request Receive.....	29
Task 7: Assign a Home Study Owner and Update the Request Status....	30
Task 8: Complete the Preliminary Home Study Response	31
Task 9: Complete the Final Home Study Response	32
Lesson 2: Sending Home Study Response to the other State	33
Task 1: Review Home Study and Sign and Upload 100A	33
Task 2: Create a New Transmittal	34
Task 3: Send a Transmittal to NEICE.....	35
Task 4: Review an Unsuccessful NEICE Transmittal	35
Lesson 3: Receiving 100B Placement Decision from Sending State	36
Task 1: Reviewing the Placement Decision Transmittal.....	36
Task 2: Assign a Child Program Supervisor to the Treatment Case.....	37
Task 3: Case Manager Supervises Case and Completes Progress Report	37

Task 4: Create a Transmittal for Progress report	38
Lesson 4: ICPC Case Closure for Receiving.....	38
Task 1: ICPC Public Agency & CJO Case Closure (Excluding Reg 4).....	38
Task 2: Reg 12 and 4 Case Closure	38
Knowledge Check!.....	39
Module 4: Cases Manually Initiated by ICPC Administrators.....	40
Lesson 1: Create a Manual IC Request.....	40
Task 1: Access the IC Request List View from a Case	40
Task 2: Enter General Information	41
Task 3: Add Services Request Information	42
Task 4: Complete the Home Study and Financial/Medical Plan Request Information	43
Task 5: Add Persons Involved.....	44
Task 6: Add Associated Attachments	45
Knowledge Check!.....	46
Glossary.....	47

Introduction

Welcome to the State of Tennessee Department of Children's Services (DCS) C-FIRST! **Interstate Compact on the Placement of Children (ICPC) 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 for ICPC Administrators. Before we dive into the details of the course, we are going to recap some general navigation terms and level set on what to expect from today's training.

Let's Dive In

This course covers the process of ICPC in C-FIRST!. The Interstate Compact on the Placement of Children (ICPC), also known as the Compact, is a statutory agreement between signatories that governs the placement of children from one state to another state for purposes of foster care and/or adoption.

Case Scenario: The Milner Family

The Milner family came to the attention of DCS after 10-year-old **David Milner** was removed from his mother's care in the state due to ongoing concerns about neglect, unstable housing, and untreated substance misuse in the home. David had experienced repeated school absences, inconsistent medical care, and periods of being left with different adults for extended times. After removal, David was placed in temporary foster care while the court reviewed his case and DCS explored longer-term placement options.

During the case review, DCS learned that David's maternal grandmother, **Dorothy Milner**, lives in **Georgia** and had maintained regular contact with him over the years. David is familiar with her, had stayed with her during past school breaks, and expressed that he felt safe with her. Dorothy Milner also contacted the case worker to say she was willing to care for David if reunification with his mother could not happen right away.

Since David is in custody of the State of Tennessee and the proposed relative placement is in another state, DCS will now follow the **ICPC** process to determine whether the out-of-state home is safe, suitable, and able to meet David's needs.

What to Expect

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

1. Navigating the C-FIRST! homepage, locating ICPC cases through list views, and using the Treatment Case dashboard to access related lists and case records.
2. Using the Search functionality to search for persons and cases from the homepage.
3. Initiating an ICPC Request and routing it to a receiving state.
4. Updating the Case Status on an ICPC IC Admin Case Send.

Your Role

As an ICPC Administrator, you are responsible for maintaining accurate case records, initiating ICPC cases to request home studies, and reviewing IC Admin Cases. You will receive ICPC Requests and

then transmit the IC Admin Cases to other states. This scenario emphasizes teamwork, accountability, and the importance of clear, timely documentation.

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

Course Objectives

Throughout this course, you will practice each skill hands on in a C-FIRST! training environment using realistic Tennessee family scenarios. You will walk through the full lifecycle of an ICPC Case: sending/receiving requests, completing fields, attaching documents, responding, and finally creating progress reports and tracking submission status. By the end of this course, you will be able to navigate the C-FIRST! ICPC Administrator screens, complete the tasks your role requires, and understand how your work connects to the broader child welfare process.

Icons Used Throughout the Course

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

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

Module 1: ICPC Process

In C-FIRST!, the work is managed directly in the system through **ICPC Administrative Cases, Interstate Compact Requests, and linked Treatment Cases**. For ICPC Administrators, the ICPC activity is now tracked in C-FIRST!.

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

- Provide an overview on the process case managers follow to complete an ICPC

Lesson 1: ICPC Send Process

The Interstate Compact on the Placement of Children (ICPC) is a statutory agreement between all 50 states, the District of Columbia, and the US Virgin Islands. As a legally binding agreement, the ICPC ensures that children have a uniform set of protections and benefits regardless of which state they are moving to or from.

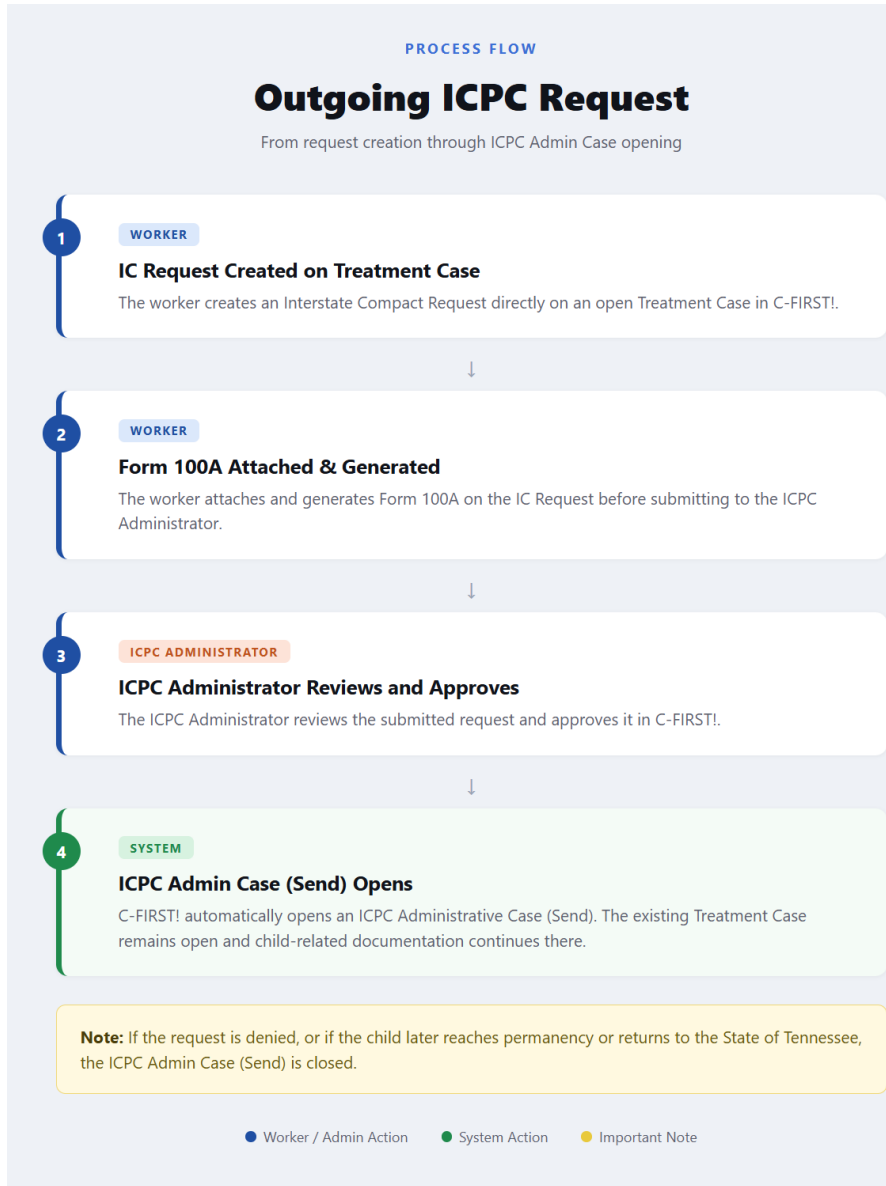
Learning Objectives

- Understand the ICPC Send process

Task 1: Outgoing (Send) process

For outgoing requests, the worker creates an Interstate Compact Request directly on an open Treatment Case in C-FIRST! and attaches and generates Form 100A at that time. The request is then submitted to the ICPC Administrator for review. Once the ICPC Administrator approves the request, C-FIRST! automatically opens an ICPC Administrative Case (Send) while the existing Treatment Case remains open, and child-related case documentation continues there. If the request is denied, or later if the child reaches permanency or returns to the State of Tennessee, the ICPC Admin Case is closed.

The important steps in the sending process are:



Lesson 2: ICPC Receive Process

The Interstate Compact on the Placement of Children (ICPC) is a statutory agreement between all 50 states, the District of Columbia, and the US Virgin Islands. As a legally binding agreement, the ICPC ensures that children have a uniform set of protections and benefits regardless of which state they are moving to or from.

Learning Objectives

- Understand the ICPC Receive Process

Task 1: Incoming (Receive) process

For incoming requests, when the ICPC Administrator receives an ICPC request from another state, C-FIRST! automatically creates an **ICPC Administrative Case (Receive)**. The ICPC Team then creates the **Interstate Compact Request** for the home study and either opens a new Treatment Case or links the request to an existing one. The case is then routed for assignment, and the Home Study Writer completes the home study in the Treatment Case. Once completed, the outcome is entered back into the ICPC case so the system can send the information to the ICPC Team.

The important steps in the receiving process are:



**System Tip!**

If a request is denied, the case will stay open for 30 days, allowing the sending state time to send a reconsideration. After 30 days the case will automatically close.

Knowledge Check!

Question 1: What happens in the outgoing (Send) process after ICPC Administrator approves the Interstate Compact Request?

- A. The Treatment Case closes immediately
- B. An ICPC Administrative Case (Send) opens while the Treatment Case stays open
- C. A new Receive case is automatically created
- D. The worker completes the home study in the ICPC Admin Case

Module 2: Request Send Process

ICPC Requests in C-FIRST! are used to initiate, track, and document placements for the Interstate Compact on the Placement (ICPC) process of children across state boundaries. Requests are initiated in Tennessee and routed to receiving states for home study and approval. ICPC Administrators document each step from referral through placement decision, with C-FIRST! tracking timelines and status updates.

After completing this module, you will be able to:

- Initiate an ICPC Request and route to a receiving state

Lesson 1: Sending ICPC Requests

Interstate Compact on the Placement of Children (ICPC) requests enable the coordination of child placements across state lines. In C-FIRST!, users initiate outgoing ICPC requests.

Learning Objectives

- Navigate to the IC Request List View from an open Case in C-FIRST!
- Create a new ICPC Case
- Establish a Person
- Create an IC Case

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

Dorothy Milner, the maternal grandmother of David Milner, lives in Georgia. Because the proposed placement lives across state lines, you must initiate an outgoing ICPC request from the open Case in C-FIRST!.

1. Log in as ICPC Administrator.
2. Navigate to the open Case for David Milner. C-FIRST! displays the Treatment Case record.
3. Scroll to the **Related Lists Quick Links** section on the Case.
4. Click the **IC Requests** hyperlink. C-FIRST! displays the **IC Request List View** screen with all existing IC Requests associated with the Case.

5. Review the **IC Request List View** screen. C-FIRST! displays columns for **IC Request ID**, **IC Request Type**, **Sending State**, **Receiving State**, **IC Request Status**, **Created Date**, and **Last Modified Date**.
6. Click **New**. C-FIRST! displays the **New IC Request** pop-up with two radio button options.
7. Click the **ICPC IC Request Send** radio button to indicate this is an outgoing ICPC request.
8. Click **Next**. C-FIRST! displays a pop-up with the ICPC IC Request Send fields organized into multiple sections.



System Tip!

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



Process Tip!

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

Task 2: Review General Information

You will now complete the **General Request Information** section for the ICPC request for David Milner#### with Dorothy Milner#### in Georgia.

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

**System Tip!**

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

Task 3: Review Services Request Information

Now let's verify the required information in the Services Request fields.

1. Locate the **Services Request Information** section on the screen.
2. Review the **Placement Type** drop-down and select public for all cases where the child is in DCS custody.
3. Review the **Priority** drop-down and select the priority status of the request. Expedited is chosen when it is a Regulation 7 and there exists an ICPC Reg #7 Expedited Placement Decision Order.
4. Review the **Intact Family Move** drop-down and select if the Child is placed in an approved Tennessee home and the entire family is moving to another state (for all regulation 1 request).
5. Review the **Supervision By** drop-down and select who will be responsible for supervision.
6. Review the **Supervisory Report** drop-down and select the frequency of reports from the receiving state.
7. Review the **Unique Care/Service Agreement** drop-down and select if there is an agency supporting the placement and you have the signed ICPC Foster/Adoptive Case Service Agreement CS-1211 and Unique Care Agreement CS-0873 to attach to the packet

Note: To make edits click on the pencil icon. After making changes click save.

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

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

1. Locate the **Home Study Request Information** section on the screen.
2. Review the **Home Study Type**.
3. Locate the **Financial/Medical Plan** section. C-FIRST! displays this section because the **Placement Type** is *Public* and the **Regulation** is not *#4 Residential Treatment Center*.
4. Review the **Financial Plan**.
5. Review the **Medical Plan**.

Note: To make edits click on the pencil icon. After making changes click save.



System Tip!

The Expedited Placement/Regulation 7 Confirmation section is conditionally visible. C-FIRST! displays this section only when the Regulation is *#7 Expedited/Priority*.



Process Tip!

When Other Individuals Residing in Home is set to Yes, at least one Persons/Organizations Involved record with the role of *Other Individual in the Home* is required before submission.

Task 5: Creating the ICPC Case

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

Task 6: Establish an Existing Person

1. Login as an ICPC Administrator and navigate to the Incoming ICPC Case.
2. Click the **Person/Organization Involved** hyperlink in the **Related List Quick Links** section. Verify that Person/Organization Involved record(s) is systematically created.
3. Click the **Person/Organization Involved ID** hyperlink where **Role** is *ICPC Child*.
4. Click the **Establish Person** button.
5. Search for the individual received in the **Person Search** pop-up by using First Name and Last Name.
6. Click **Search**.
7. Click the drop-down arrow on the far right of the row and click **Associate**. A success message is displayed on the screen.

Task 7: Create an IC Case

Once the case has sufficient information, the ICPC Administrator proceeds with the Home Study by creating a new ICPC IC Request Receive record and determining whether a new Treatment Case is needed.

1. Click on the **IC Request** hyperlink from the **Related List Quick Links**.
2. Click **New** from the list view.
3. Click the **ICPC IC Request Receive** radio button and click **Next**.
4. Verify that the following fields are auto populated from the associated IC Administrative – ICPC case:
 - a. IC Request Status is Pending
 - b. IC Request Type is IC Administrative - ICPC
 - c. Assigned IC Admin Owner is the user creating the IC Request Receive
 - d. Compact Scenario
 - e. IC Admin Case is associated IC Administrative – ICPC Case ID E
5. Complete the required fields.
6. Update the **IC Request Status** to Submitted
7. Click **Save**.

Lesson 2: Managing Transmittals for Request Send

Transmittals enable interstate communication regarding child placement requests on an ICPC IC Admin Case by the ICPC Administrator. You will practice creating, sending, and reviewing transmittals exchanged between states through the National Electronic Interstate Compact Enterprise (NEICE) Clearinghouse.

Learning Objectives

- Navigate to the Transmittals List View from an ICPC IC Admin Case
- Create a new transmittal and populate required fields on the Transmittals Detail screen
- Send a transmittal to the NEICE Clearinghouse and review the transaction result

Task 1: Review the Transmittals List View

ICPC Administrator initiated an ICPC request to place David Milner#### with their maternal grandmother, Dorothy Milner####, who resides in Georgia.

1. Log in as the ICPC Administrator.
2. Navigate to the ICPC IC Admin Case for David Milner####. C-FIRST! displays the ICPC IC Admin Case.
3. Locate the **Related List Quick Links** section on the ICPC IC Admin Case.
4. Click the **Transmittals** hyperlink. C-FIRST! displays the **Transmittals** list view.
5. Review the list of transmittals. Each row displays the **Transmittal ID, Transmittal Type, Transmittal Status, Sending State, and Transaction Date**.
6. Click the **Transmittal ID** of an existing transmittal to open it. C-FIRST! displays the **Transmittals Detail** screen for the selected record.



System Tip!

The Transmittals List View displays all transmittals in chronological order. You can click any Transmittal ID to view its details or click the New Transmittal button to create a new record.

Task 2: Create a New Transmittal

You need to create a new transmittal to send a status report response to Georgia regarding the placement of David Milner#### with Dorothy Milner####. You will populate the General Information fields and save the transmittal in *Draft* status.

1. Navigate to Central Form Search screen and search for 100A Home Study Request form.
2. The form gets attached to the ICPC Case that the user provides.
3. Click **New** from the **Transmittals List View**. C-FIRST! displays the **New Transmittal** screen with the **Transmittal Status** defaulted to *Draft*.
4. Review the **Transmittal ID** field. C-FIRST! auto-generates a unique identifier and displays it as read-only.
5. Review the **From** field. C-FIRST! auto-populates the value as *Tennessee* and displays it as read-only.
6. Review the **To** field. C-FIRST! defaults the value to the Receiving State from the ICPC IC Admin Case based on the Compact Scenario.
7. Click the **Transmittal Type** drop-down. C-FIRST! displays the available transmittal type options.
8. Select *Home Study Request*.
9. Click the **Purpose of Transmittal** drop-down. C-FIRST! displays the available purpose options.
10. Select the applicable purpose for this transmittal.
11. Click the **Urgent Request Indicator** drop-down. Select *No*.
12. Enter any additional information in the **Notes** field.
13. Select **Save**.
14. Click on the **Transmittal Person** hyperlink under the Related List Quick Links section and click the **New** button.
15. On the **New Transmittal Person** screen search for a **Transmittal Child** whom the transmittal is for.

16. Verify that the following fields are auto populated from the **Persons/Organizations Involved** record selected on the Transmittal Child screen; First Name, Last Name, Gender, Person ID, and Date of Birth.
17. Select **Save**.
18. On the **Transmittal** detail screen, click on the **Transmittal Attachments** hyperlink under the Related List Quick Links section. Click the **New** button.
19. Select the **Document Type** field and enter **Home Study Request Packet**.
20. Select the **Document Type** field and enter **100A**.
Note: On the 100A you will need to enter your email address. You will receive an email, click the email and sign the document. Attach the signed document to the ICPC Case.
21. Select the **Transmittal Child** field and enter the name of the Child that the attachment is for.
22. Select the **Transmittal Attachment** field and select a **Progress Report** that has been generated.
23. Update the **Transmittal Status** to In Progress.
24. Click **Save**.

**Process Tip!**

- Selecting a Transmittal Type controls which conditional fields and sections C-FIRST! displays. For example, selecting Status Report Response displays the Case Status Update section and requires the Last Progress Report Received Date field.
- Before sending the transmittal, you must add at least one ICPC child to the Transmittal Persons related list.

**System Tip!**

C-FIRST! prompts the validation message when you save a transmittal in Draft status. This reminds you that the transmittal has not been sent to NEICE. Saving in Draft status allows you to add Transmittal Persons and Transmittal Attachments before sending.

Task 3: Send a Transmittal to NEICE

You have completed all required fields and added at least one person to the Transmittal Persons related list for the transmittal regarding David Milner####. You are now ready to send the transmittal to Georgia through NEICE.

1. Navigate to the **Transmittals Detail** screen for the transmittal created in the previous task.
2. Click the **Transmittal Status** drop-down. C-FIRST! displays the available status options.
3. Select *In Progress*.
4. Click **Save**. C-FIRST! triggers the interface to transmit the record to NEICE and sets all fields and related lists to read-only.
5. Review the **Transmittal Status** field. C-FIRST! updates the status to *Synced with NEICE* after receiving a successful acknowledgment from NEICE.
6. Locate the **NEICE Information** section on the **Transmittals Detail** screen.
7. Review the **NEICE Transaction ID** field. C-FIRST! auto-populates this field with the unique identifier from NEICE as read-only.
8. Review the **Transaction Date** field. C-FIRST! auto-populates this field with the date of the NEICE transaction as read-only.

Lesson 3: Receive Home Study Response from the other State

Task 1: Review the Home Study Response

The ICPC IC Request Send for Daniel Miner#### has been completed and approved. C-FIRST! has created an ICPC IC Admin Case Send to track the outgoing referral to the state where Dianne Miner#### resides. You will now access and review the auto populated fields on the case.

1. Log in as an ICPC Administrator.
2. Click the Notifications bell to review the Transmittal Notification.

3. Click on the Transmittal hyperlink.
4. Review the Transmittal and Documents.
5. Navigate back to the Case and review the Home Study Response Information section populated by the system.
6. Click the **Case Status** field and update the Case Status to Placement Pending. This will notify the Case Manager on the associated Case to initiate the placement.
7. Click **Save**. Once Saved C-FIRST! will automatically send a notification to the Case Manager of the Treatment Case.
8. For Public Agency cases create a manual task from the Task to add the predeparture information.



System Tip!

- You can also access the ICPC IC Admin Case Send by navigating to the completed ICPC IC Request Send record and clicking the **IC Admin Case ID** hyperlink in the **Navigation Links** section. A third option is to navigate to the originating Treatment, Permanency, or Investigation Case and select the **Associated Cases** related list.
- All related documentation and attachments from the ICPC IC Request Send are automatically transferred to the ICPC IC Admin Case Send. Review the **Attachments** related list to confirm the documents carried over.
- Once the system sends the Home Study Response, the system will automatically update the fields on the Home Study Response section on the IC Admin Case.

Lesson 4: Placement Decision Made

Task 1: Create a task to the ICPC Administrator to notify the placement of the child

1. Create a manual task.
2. Update the Placement Status.
3. Create a Transmittal.

4. Send a 100B Placement Decision.

Task 2: ICPC Administrator updates the Placement Status section of the Persons/Organizations Involved record

1. Log in as an ICPC Administrator.
2. Click on the **Task Notification** to navigate to the case.
3. Navigate to the Persons/Involved record of ICPC Child.
4. Populate the Placement Decision section:
 - a. Placement Decision Type = Initial Placement
 - b. Initial Placement Date
 - c. Placement Status
5. Click **Save**.

Task 3: Create Transmittal to send 100B Placement Decision to the Receiving State

1. Navigate to the Central Form Search and generate the 100B Placement Decision form
2. Navigate to the case and create a transmittal
 - a. Transmittal Type = Sending 100B Placement Decision
3. Attach transmittal person and transmittal attachment
4. Update status to In Progress
5. Once successful, system will update the transmittal status to Synched with NEICE

Lesson 5: Receiving Progress Report

Task 1: Transmittal Notification

1. Review a Transmittal Notification

Lesson 6: ICPC Case Closure for Sending

Task 1: Close an ICPC Case for Sending

1. The ICPC Administrator request Concurrence from the receiving state. Through a transmittal
2. Once received shares concurrence with the case worker.

3. Case worker will submit the 100B and if needed the court order.
4. Review and sign the 100B.
5. Note: On the 100B you will need to enter your email address. You will receive an email, click the email and sign the document. Attach the signed document to the ICPC Case.
6. Transmit 100B and other documents to the receiving state.
7. Click on the Case Status field and select Closed
8. Click **Save**.

Knowledge Check!

Question 1: What status does a new IC Request default to when it is first created in C-FIRST!?

- A. Submitted
- B. Pending
- C. Completed
- D. Closed

Question 2: What must an ICPC Administrator do before sending a transmittal to the NEIVE Clearinghouse?

- A. Close the ICPC Case
- B. Delete all attachments
- C. Change the Sending State
- D. Add at least one ICPC child to the Transmittal Persons list

Module 3: Request Receive Process

After completing this module, you will be able to:

- Receive and Review a Request
- Send a Home Study Response to the other State
- Receive a 100B Placement Decision from the Sending State
- Close an ICPC Case for Receiving

Lesson 1: Receiving and Reviewing Requests

In C-FIRST!, the ICPC IC Request Receive workflow allows the ICPC Administrator to process incoming interstate placement requests from other states. Users create the request, review auto populated information, submit for assignment, and complete the home study response.

Learning Objectives

- Assign an Incoming ICPC Referral
- Review Received Transmittals
- Establish an Existing Person
- Submit an ICPC IC Request Receive
- Assign a Home Study Owner
- Update a Home Study Status
- Complete the Preliminary and Final Home Study Response

Task 1: Assign Incoming ICPC Referral

A Home Study Request transmittal is received from Virginia. The system automatically creates an ICPC IC Admin Case Receive record in C-FIRST!. As the ICPC Administrator from the ICPC office, perform the following steps to assign the case to yourself.

1. Log in as the ICPC Administrator.
2. Click the **Cases** tab from the navigation bar on the homepage.
3. Click the pinned list drop-down arrow and select **Cases Unassigned Incoming ICPC Admin Cases** list view.
4. Click on the **Case ID** hyperlink to navigate to the Case detail screen.
5. Click the **pencil** icon and update the **Case Status** to *Open*.
6. Update the **Assigned IC Admin Owner** field with your name.

7. Click **Save**.

Task 2: Review the Transmittals List View

ICPC Administrator initiated an ICPC request to place David Milner#### with their maternal grandmother, Dorothy Milner####, who resides in Tennessee. As the ICPC Administrator you will need to review the existing transmittals on the ICPC IC Admin Case before creating a new one.

1. Log in as the ICPC Administrator.
2. Navigate to the ICPC IC Admin Case for David Milner####. C-FIRST! displays the ICPC IC Admin Case.
3. Locate the **Related List Quick Links** section on the ICPC IC Admin Case.
4. Click the **Transmittals** hyperlink. C-FIRST! displays the **Transmittals** list view.
5. Review the list of transmittals. Each row displays the **Transmittal ID, Transmittal Type, Transmittal Status, Sending State, and Transaction Date**.
6. Click the **Transmittal ID** of an existing transmittal to open it. C-FIRST! displays the **Transmittals Detail** screen for the selected record.



System Tip!

The Transmittals List View displays all transmittals in chronological order. You can click any Transmittal ID to view its details or click the New Transmittal button to create a new record.

Task 3: Review a Received Transmittal

Virginia has sent a transmittal regarding the placement of David Milner#### with Dorothy Milner####. C-FIRST! received the transmittal through NEICE and generated a notification for the assigned IC Admin Owner. You need to review the received transmittal.

1. Navigate to the ICPC IC Admin Case for David Milner####.
2. Click the **Transmittals** hyperlink in the **Related List Quick Links** section. C-FIRST! displays the **Transmittals List View**.
3. Locate the transmittal with a **Transmittal Status** of *Received*.
4. Click the **Transmittal ID** for the received transmittal. C-FIRST! displays the **Transmittals Detail** screen with all fields as read-only.
5. Review the **Transmittal Status** field. C-FIRST! displays the value as *Received*.
6. Review the **From** field to confirm the Sending State.
7. Review the **Transmittal Type** field to identify the type of communication received.
8. Locate the **NEICE Information** section. Review the **NEICE Transaction ID** and **Transaction Date** fields.
9. Review the **Notes** field for any additional information provided by the Sending State.
10. Review the **Transmittal Persons** and **Transmittal Attachments** related lists for persons and documents associated with the received transmittal.



System Tip!

All fields on a received transmittal are read-only. You cannot modify information sent by another state.



Process Tip!

C-FIRST! generates a notification with the subject New Transmittal Received when a transmittal arrives through NEICE. Clicking the notification navigates you directly to the ICPC IC Admin Case.

Task 4: Establish an Existing Person

1. Login as an ICPC Administrator and navigate to the Incoming ICPC Case.
2. Click the **Person/Organization Involved** hyperlink in the **Related List Quick Links** section. Verify that Person/Organization Involved record(s) is systematically created.
3. Click the **Person/Organization Involved ID** hyperlink where **Role** is *ICPC Child*.
4. Click the **Establish Person** button.
5. Search for the individual received in the **Person Search** pop-up by using First Name and Last Name.
6. Click **Search**.
7. If child is found, click the drop-down arrow on the far right of the row and click **Associate**. A success message is displayed on the screen.
8. If child is not found, C-FIRST! will give the option to create a new person. Fill out all of the required information on the Person Record. Click Save. Then the ICPC Administrator will Generate a PID and create a Person Type Person record.

Task 5: Navigate to the IC Request List View

The ICPC IC Admin Case Receive for the Milner#### family has been created following a request from Virginia to evaluate Dorothy Milner#### as a placement resource for David Milner####. As the ICPC Administrator, navigate to the IC Request List View to create a new IC Requests to send a request to FCS Program Coordinator for a Home Study.

1. From the **ICPC IC Admin Case Receive**, locate the **Related Lists Quick Links** section.
2. Click the **IC Requests** hyperlink. C-FIRST! displays the **IC Request List View**.
3. Review the list columns: **IC Request ID**, **IC Request Type**, **Sending State**, **Receiving State**, **IC Request Status**, **Created Date**, and **Last Modified Date**.

**System Tip!**

The IC Request List View displays all IC Requests associated with the current ICPC IC Admin Case. Each row represents a separate request record with its current status.

Task 6: Review Auto Populated Fields and Submit the ICPC IC Request Receive

The ICPC Administrator will review the auto populated fields on the **ICPC IC Request Received** for the Milner#### family and submit the request for assignment to an FCS Program Coordinator.

1. Review the **Request Type** and **Compact Scenario** fields. C-FIRST! displays the auto populated values from the parent case.
2. Review the **Sending State** and **Receiving State** fields. C-FIRST! displays the values carried over from the parent case.
3. Review the **IC Request Status** field. C-FIRST! displays *Pending* as the default value.
4. Review the **Assigned IC Admin Owner** field. C-FIRST! displays the name of the ICPC Administrator who created the request.
5. Scroll to the **Services Request Information** section.
6. Review the auto populated fields: **Placement Type, Type of Care, Priority, Regulation, Supervision By, Supervisory Report**, and **Unique Care/Service Agreement**.
7. Navigate to the additional information section and select the Treatment Follow Up field to create a new Treatment Case or Link to an Existing Treatment Case.
8. Assign a FCS Program Coordinator
9. Click in the **Status** field and update the Status to Submitted.
10. Create a Manual Task from the Task to send to the FCS Program Coordinator based on the Home Study Request type.
11. Click **Save**. C-FIRST! saves the record.

**System Tip!**

All fields in the Services Request Information section are auto populated and read-only. These values originate from the original ICPC IC Admin Case Receive when the ICPC IC Request Receive is created.

**Process Tip!**

- The **Treatment Case Follow-Up** field determines how the home study connects to a Treatment Case. Selecting *New Treatment Case* creates a new Treatment Case upon submission. Selecting *Link to Existing Treatment* requires you to populate the Existing Treatment Case ID field instead.
- After new Treatment case is created, the ICPC IC Request Receive is assigned to a Home Study Owner, a task for the assigned Home Study Owner is created to initiate home study evaluation.
- C-FIRST! automatically assigns the submitted request to a FCS Program Coordinator. The new Treatment Case is created and linked to the request.

Task 7: Assign a Home Study Owner and Update the Request Status

As the FCS Program Coordinator, pick up the ICPC IC Request Receive for the Milner#### family that has been assigned to you. Assign a Home Study Owner to conduct the home study evaluation for Dorothy Milner#### and update the request status to begin the evaluation.

1. Log in as a FCS Program Coordinator
2. Navigate to the **ICPC IC Request Receive** details screen for the applicable record.
3. Locate the **Home Study Requested** section.
4. Enter the name of the Home Study Owner in the **Assigned Home Study Owner** field.
5. Click the **IC Request Status** drop-down.
6. Select *In Progress*.

7. Click **Save**. C-FIRST! saves the record and creates a task for the assigned Home Study Owner with a due date based on the applicable regulation.



Process Tip!

C-FIRST! sets the **Home Study Evaluation** task due date based on the Regulation value. Regulation #1 (Intact Family Move) and #2 (DCS/Child Welfare/CJO) receive a 60 calendar day due date for the task. Regulation #7 (Expedited/Priority) receives a 20 business day due date for the task. Regulation #4 (Residential Treatment Center) and #12 (Private/Independent Adoption) receive a 3 business day due date for the task.

Note: If the Home Study is completed within the timeframe the preliminary Home Study Response will not be completed.

Task 8: Complete the Preliminary Home Study Response

As the assigned Home Study Owner, the preliminary home study evaluation for Dorothy Milner#### as a placement resource has been completed. Navigate to the ICPC IC Request Receive for the Milner#### family to record the preliminary home study response.

1. Navigate to the **ICPC IC Request Receive** details screen for the applicable record.
2. Scroll down to the **Home Study Response Information** section.
3. Click the **Is this the Preliminary Home Study?** drop-down.
4. Select **Yes**. C-FIRST! displays the **Preliminary Home Study Response** and **Preliminary Home Study Completion Date** fields.
5. Click the **Preliminary Home Study Response** drop-down.
6. Select the applicable response value for the preliminary evaluation.
7. Enter the completion date in the **Preliminary Home Study Completion Date** field.
8. Click the **Is this the Final Home Study?** drop-down.
9. Select **No**.
10. Click the **IC Request Status** drop-down.
11. Select *Preliminary Completed*.

12. Click **Save**. C-FIRST! saves the record and sends a notification to the assigned IC Admin Owner and FCS Program Coordinator.



System Tip!

If the Preliminary Home Study Completion Date is more than 45 days after the Home Study Requested Date, C-FIRST! requires you to complete the **Over 45 Day Reason** field before saving.



Process Tip!

After saving with *Preliminary Completed* status, the Home Study Owner can navigate back to the IC Request in the future to complete the final home study evaluation. The preliminary home study response information carries over to the associated ICPC IC Admin Case Receive.

Task 9: Complete the Final Home Study Response

As the assigned Home Study Owner, the final home study evaluation for Dorothy Milner#### has been completed. Return to the ICPC IC Request Receive for the Milner#### family to record the final home study response and close out the evaluation.

Note: The process steps to enter the home in C-FIRST! will be covered in the Foster Home Management training.

1. Navigate to the **ICPC IC Request Receive** details screen for the applicable record.
2. Scroll down to the **Home Study Response Information** section. C-FIRST! displays the **Home Study Response Information** section with the previously saved preliminary response data.
3. Click the **Is this the Final Home Study?** drop-down.
4. Select **Yes**. C-FIRST! displays the **Final Home Study Response** and **Final Home Study Completion Date** fields.
5. Click the **Final Home Study Response** drop-down.
6. Select the applicable response value for the final evaluation.
7. Enter the completion date in the **Final Home Study Completion Date** field.

8. Click the **IC Request Status** drop-down.
9. Select *Final Completed*.
10. Click **Save**. C-FIRST! saves the record, sends a notification to the assigned IC Admin Owner and FCS Program Coordinator, and sets all fields to read-only.



System Tip!

If the Final Home Study Completion Date is more than 60 days after the Home Study Requested Date, C-FIRST! requires you to complete the **Over 60 Day Reason** field before saving.



Process Tip!

If the Final Home Study Response is denied, the ICPC IC Admin Case remains open for 30 business days to allow the Sending State to submit another 100A Home Study Request for reconsideration. If no transmittal is received within 30 business days, C-FIRST! will auto-close the ICPC IC Admin Case.

Lesson 2: Sending Home Study Response to the other State

Transmittals enable interstate communication regarding child placement requests on an ICPC IC Admin Case by the ICPC Administrator. You will practice creating, sending, and reviewing transmittals exchanged between states through the National Electronic Interstate Compact Enterprise (NEICE) Clearinghouse.

Learning Objectives

- Review a Home Study and Sign and Upload the 100A
- Create a new transmittal
- Send a transmittal to the NEICE
- Review an Unsuccessful NEICE Transmittal

Task 1: Review Home Study and Sign and Upload 100A

1. Review the Home Study.
2. Update the 100A with approval checked or marked, signature, and date.

Note: On the 100A the ICPC Administrator will need to enter their email address. The ICPC Administrator will receive an email, click the email and sign the document. Attach the signed document to the ICPC Case.

Task 2: Create a New Transmittal

1. Click **New Transmittal** from the **Transmittals List View**. C-FIRST! displays the **Transmittals Detail** screen with the **Transmittal Status** defaulted to *Draft*.
2. Review the **Transmittal ID** field. C-FIRST! auto-generates a unique identifier and displays it as read-only.
3. Review the **From** field. C-FIRST! auto-populates the value as *Tennessee* and displays it as read-only.
4. Review the **To** field. C-FIRST! defaults the value to the Receiving State from the ICPC IC Admin Case based on the Compact Scenario.
5. Click the **Transmittal Type** drop-down. C-FIRST! displays the available transmittal type options.
6. Select *Home Study Response*.
7. Click the **Purpose of Transmittal** drop-down. C-FIRST! displays the available purpose options.
8. Select the applicable purpose for this transmittal.
9. Enter any additional information in the **Notes** field.
10. Click on the **Transmittal Person** hyperlink under the Related List Quick Links section and click the **New** button.
11. On the **New Transmittal Person** screen search for a **Transmittal Child** whom the transmittal is for.
12. Verify that the following fields are auto populated from the **Persons/Organizations Involved** record selected on the Transmittal Child screen; First Name, Last Name, Gender, Person ID, and Date of Birth.
13. On the **Transmittal** detail screen, click on the **Transmittal Attachments** hyperlink under the Related List Quick Links section. Click the **New** button.
14. Select the **Document Type** field and enter **100A**.
15. Select the **Transmittal Child** field and enter the name of the Child that the attachment is for.

16. Select the **Transmittal Attachment** field and select a **Home Study Response** that has been generated.
17. Update the **Transmittal Status** to In Progress.
18. Click **Save**.

Task 3: Send a Transmittal to NEICE

You have completed all required fields and added at least one person to the Transmittal Persons related list for the transmittal regarding David Milner####. You are now ready to send the transmittal to Virginia through NEICE.

1. Navigate to the **Transmittals Detail** screen for the transmittal created in the previous task.
2. Click the **Transmittal Status** drop-down. C-FIRST! displays the available status options.
3. Select *In Progress*.
4. Click **Save**. C-FIRST! triggers the interface to transmit the record to NEICE and sets all fields and related lists to read-only.
5. Review the **Transmittal Status** field. C-FIRST! updates the status to *Synced with NEICE* after receiving a successful acknowledgment from NEICE.
6. Locate the **NEICE Information** section on the **Transmittals Detail** screen.
7. Review the **NEICE Transaction ID** field. C-FIRST! auto-populates this field with the unique identifier from NEICE as read-only.
8. Review the **Transaction Date** field. C-FIRST! auto-populates this field with the date of the NEICE transaction as read-only.

Task 4: Review an Unsuccessful NEICE Transmittal

A transmittal sent regarding David Milner#### was not received by NEICE. You need to review the error details on the **Transmittals Detail** screen to understand the failure.

1. Navigate to the **Transmittals Detail** screen for the failed transmittal. C-FIRST! displays all fields as read-only.

2. Review the **Transmittal Status** field. C-FIRST! displays the value as *Incomplete*.
3. Locate the **NEICE Information** section.
4. Review the **Error Message Received** and the NEICE Transaction ID field. C-FIRST! displays the error message returned by NEICE as read-only.

**Process Tip!**

When a transmittal fails, C-FIRST! generates a notification for the assigned IC Admin Owner with the subject line containing the Transmittal ID. Review the error message to resolve the issue and resend the transmittal.

Lesson 3: Receiving 100B Placement Decision from Sending State

Learning Objectives

- Review the Placement Decision Transmittal
- Assign a Child Program Supervisor to the Treatment Case
- Supervise Case and Complete Progress Report
- Create a Transmittal for Progress Report

Task 1: Reviewing the Placement Decision Transmittal

1. Log in as an ICPC Administrator
2. Notification is triggered
3. Review that **Case Status** field has updated to Placement Complete
4. Review Transmittal and attachment
5. Review the Persons / Organization involved record of the ICPC Child
6. Review the Placement Status section (Note: this Placement status section is auto populated by the interface)
7. Mark the **Case Status** to Complete

Task 2: Assign a Child Program Supervisor to the Treatment Case

1. Navigate to the Treatment Case that is linked on the ICPC Case.
2. Assign to the Child Program Supervisor for that County on the case.
3. The Child Program Supervisor will create a manual task for the Placement Invoicing team to create a placement record.

Task 3: Case Manager Supervises Case and Completes Progress Report

1. Log in as Case Manager
2. Navigate to the ICPC Case and into the Progress Report Related List
3. Click on the record that is worklisted
4. Complete the Progress Report
5. Submit it for approval to Case Supervisor.
6. Supervisor reviews and approves.
7. Once approved by the Case supervisor, system notifies the ICPC Administrator that they need to send a progress report transmittal

Task 4: Create a Transmittal for Progress report

Refer to Module 3 Lesson 2 Task 2 for creating transmittal steps.

Lesson 4: ICPC Case Closure for Receiving

Learning Objectives

- Close an ICPC Public Agency & CJO Case
- Close a Reg 12 and 4 Case

Task 1: ICPC Public Agency & CJO Case Closure (Excluding Reg 4)

1. ICPC team will receive a transmittal with attached 100B.
2. Create a manual task for the Invoicing Placement worker and the Treatment Case Manager to discharge the placement and close the Treatment Case.
3. Click on the **Case Status** field and select Closed
4. Click **Save**.

Task 2: Reg 12 and 4 Case Closure

1. ICPC team will receive a transmittal with attached 100B.
2. Click on the **Case Status** field and select *Closed*.
3. Click **Save**.

Knowledge Check!

Question 1: When the Home Study Owner completes the Final Home Study Response, what happens to the record in C-FIRST!?

- A. All fields become read-only
- B. It gets deleted
- C. It moves back to Pending Status
- D. It is automatically sent to NEICE

Question 2: What due date does C-FIRST! assign to a Home Study Evaluation task for a Regulation #7 (Expedited/Priority) request?

- A. 3 business days
- B. 45 calendar days
- C. 20 business days
- D. 60 calendar days

Question 3: What does C-FIRST! do when a transmittal fails to send to NEICE?

- A. It automatically resends the transmittal
- B. It generates a notification for the assigned IC Admin Owner
- C. It closes the ICPC Case
- D. It deletes the transmittal record

Module 4: Cases Manually Initiated by ICPC Administrators

After completing this module, you will be able to:

- Create a Manual IC Request



System Tip!

For CJO Cases where there is an open CPS Investigation Case, the ICPC Administrator will manually create the treatment case directly from the Person Record to link to the IC Case.

Lesson 1: Create a Manual IC Request

Learning Objectives

- Access the IC Request List View
- Complete an IC Request
- Complete a Home Study
- Add Persons Involved
- Add Associated Attachments

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

Referring to the Carter family case from the Case Management training, Jaylen Carter is being placed with his great aunt Ruth Carter. Because the proposed placement lives across state lines, you must initiate an outgoing ICPC request from the open Case in C-FIRST!.

1. Log in as ICPC Administrator.
2. Navigate to the open Case for Jaylen Carter. C-FIRST! displays the Treatment Case record.
3. Scroll to the **Related Lists Quick Links** section on the Case.
4. Click the **IC Requests** hyperlink. C-FIRST! displays the **IC Request List View** screen with all existing IC Requests associated with the Case.
5. Review the **IC Request List View** screen. C-FIRST! displays columns for **IC Request ID**, **IC Request Type**, **Sending State**, **Receiving State**, **IC Request Status**, **Created Date**, and **Last Modified Date**.

6. Click **New**. C-FIRST! displays the **New IC Request** pop-up with two radio button options.
7. Click the **ICPC IC Request Send** radio button to indicate this is an outgoing ICPC request.
8. Click **Next**. C-FIRST! displays a pop-up with the ICPC IC Request Send fields organized into multiple sections.



System Tip!

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

For ICPC IC Request Receive the case starts from a Treatment Case and for an ICPC IC Request Send the case will start from the IC Request.



Process Tip!

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

Task 2: Enter General Information

You will now complete the **General Request Information** section for the ICPC request for David Milner#### with Dorothy Milner#### in Georgia.

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

5. Review the **IC Request Status** field. C-FIRST! defaults this field to *Pending* upon creation.



System Tip!

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

Task 3: Add Services Request Information

Now let's verify the required information in the Services Request fields.

1. On the **Request** tab, locate the **Services Request Information** section.
2. Click the **Placement Type** drop-down and select public for all cases where the child is in DCS custody.
3. Click the **Priority** drop-down and select the priority status of the request. Expedited is chosen when it is a Regulation 7 and there exists an ICPC Reg #7 Expedited Placement Decision Order.
4. Click the **Intact Family Move** drop-down and select if the Child is placed in an approved Tennessee home and the entire family is moving to another state (for all regulation 1 requests).
5. Click the **Supervision By** drop-down and select who will be responsible for supervision.
6. Click the **Supervisory Report** drop-down and select the frequency of reports from the receiving state.
7. Click the **Unique Care/Service Agreement** drop-down and select if there is an agency supporting the placement and you have the signed ICPC Foster/Adoptive Case Service Agreement CS-1211 and Unique Care Agreement CS-0873 to attach to the packet.

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

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

1. Locate the **Home Study Request Information** section on the screen.
2. Click the **Home Study Type**.
3. Click the Request tab and navigate to the **Financial/Medical Plan** section. C-FIRST! displays this section because the **Placement Type** is *Public* and the **Regulation** is not *#4 Residential Treatment Center*.
4. Click the **Financial Plan** drop down and select the appropriate financial plan.
5. Click the **Medical Plan drop down** and select the appropriate medical plan.
6. Click **Save**.



System Tip!

The Expedited Placement/Regulation 7 Confirmation section is conditionally visible. C-FIRST! displays this section only when the Regulation is *#7 Expedited/Priority*.



Process Tip!

When Other Individuals Residing in Home is set to *Yes*, at least one Persons/Organizations Involved record with the role of *Other Individual in the Home* is required before submission.

Task 5: Add Persons Involved

The Persons/Organizations Involved List View displays all individuals and organizations associated with the IC Request in a table. The list provides a comprehensive view of all persons and organizations involved, with the following columns:

- Person/Organization Involved ID
- Name
- Relationship
- Address
- Contact Type
- Notes

The list provides a quick view of information for all persons and organizations associated with the IC Request, allowing users to monitor and manage participants. Each record can be accessed for detailed viewing or editing by clicking Person/Organization Involved ID.

1. Click the **Persons/Organizations Involved** hyperlink from the **Related List Quick Links** section. The **Persons/Organizations Involved** screen displays.
2. Click **New** to create a new person record. The **New Persons/Organizations Involved** pop-up displays.
3. Select the **Individual Involved** radio button and click **Next**. The **New Persons/Organizations Involved: Individual Involved** pop-up displays.
4. Click the **Person ID** field and enter the Person ID of the child involved in the request.

Note: Some of the fields will be auto populated based on person added in the **Person ID** field.

5. Click the **Relationship** drop-down and select the relationship of the individual added to the IC Request.
6. Click **Role**, then click the right arrow to select the relevant option from the **Available** section. The options in the **Available** section are:

- Financial Responsibility
- ICPC Child
- Other Individual in the Home
- Other - Individual Placement

- Parent/Relative Placement
- Prospective Foster/Adoptive Home Placement
- Responsible for Planning

**Process Tip!**

- It is mandatory to add a minimum of two person involved records with *ICPC Child*, *Financial Responsibility*, *Responsible for Planning*, *Sending Agency*, *Supervising Agency in Receiving State*, and *Parent/Relative Placement* roles respectively before submitting the IC Request for approval.
 - If you select **Yes** from the **Intact Family Move** drop-down while creating an IC Request, a person involved record with the role of *Parent/Relative Placement* must be added.
 - Multiple roles may be added to a single person involved record. However, *ICPC Child* and *Financial Responsibility* roles cannot be added to the same person involved record.
7. Click **Save**. The record is saved.

Task 6: Add Associated Attachments

The Associated Attachments allows ICPC Administrator to link existing documents from underlying cases to specific ICPC IC Requests. Rather than uploading new documents, this functionality lets users choose existing attachments from the original Treatment, Permanency, or Investigation case and associate them to the ICPC IC Request. When the IC Request is approved and the IC Case is created, copies of any attachments identified in the Associated Attachments list will be made and associated to the new case.

**System Tip!**

To attach a new document, users can click the Attachments tab and click the Basic File Upload button.

1. Click the **Associated Attachments** hyperlink from the **Related List Quick Links** section. The **Associated Attachments** screen displays.

2. Click **Associate Attachment** to associate a new attachment. The **New Associated Attachment: IC Request** pop-up displays.
3. Click the **Document Name** field and enter the document names to look them up in CFIRST!.
Note: The look up results are limited to the attachments that are on the underlying case (originating Treatment, Permanency, or Investigation Case).
4. Verify that the attachment is displayed on the **Attachment** tab of the **IC Request**.
5. Click **Save**. The record is saved.

Knowledge Check!

Question 1: What does the Associated Attachments feature allow an ICPC Administrator to do?

- A. Link existing documents from the underlying case to the IC Request
- B. Upload brand new documents from their computer
- C. Delete documents from the Treatment Case
- D. Send documents directly to NEICE

Question 2: If the Intact Family Move drop down is set to Yes when creating an IC Request, which role must be added to a Persons Involved record?

- A. Sending Agency
- B. Other Individual in the Home
- C. Parent/Relative Placement
- D. Prospective Foster/Adoptive Home Placement

Glossary

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

Term	Definition
100A	The Interstate Compact Placement Request is the formal document used in the child welfare system to request and approve the placement of a child across state lines
100B	The Interstate Compact Report on Child's Placement Status is required to notify both states' compact administrators of any changes in a child's status.
Case Person Detail Screen	The screen name for viewing person information within a case context rather than Person Detail screen.
Case Summary	The tab on a Record providing high-level overview of Case status, assessments, placements, interactions, and court orders.
Comprehensive Child Welfare System (CCWIS)	This refers to DCS's modernization project for child welfare in conjunction with Deloitte.
C-FIRST!	Tennessee's CCWIS platform built on C-FIRST!. C-FIRST! stands for Child and Family Information Records System Tracking.
Homepage	The main landing page in C-FIRST! that displays widgets and other workload management tools.
ICPC	Interstate Compact on the Placement of Children
ICPC Administrator	The person that is responsible for coordinating the safe and legal placement of children across state lines for foster care or adoption
IC Case	ICPC Case involving placement or supervision of a child across state lines.

Term	Definition
List View	This refers to the standard/default list views that 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, Notification Bell Icon, Global Search Bar, User Profile, and Guidance Center
Personal Identification Number (PID)	Personal Identification number which is a unique identifier automatically assigned to each person record in C-FIRST!
Related List	This refers to the section on a C-FIRST! record page that displays associated like Persons Involved, Court Orders, Placements, Case Documentation, and Staff Involved.
Treatment Case	The primary case management record in C-FIRST for children and families across all programs. It is used to document and manage contacts, assessments, permanency plans, meetings, placements, court activity, and other casework. It can also link to a Permanency Case while remaining the family's central record.
Worklisted	Task status indicating you have been assigned a task to complete.