



C-FIRST! Training

Legal Course Learner Guide

Tennessee Department of Children's Services



Legal Course Learner Agenda

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Introduction

Welcome to State of Tennessee Department of Children's Services (DCS) C-FIRST! **Legal 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 Legal related processes in C-FIRST! including investigations and reviews, court jurisdictions, filing petitions, creating and processing court orders, managing hearings, uploading documentation, and preparing documents for legal proceedings. 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

Let's take a moment to briefly discuss some basic fundamentals about how C-FIRST! helps you manage your workload and case information. As we take a look at cases throughout this course, keep in mind that these were previously referred to as CPS Cases and will now refer to all Cases in C-FIRST!.

The homepage includes global features available to all roles:

- **Global Search Bar:** search for records across cases, persons, and intakes.
- **Home tab dropdown:** navigate between tabs such as **Persons**, **Cases**, **Incident Reports**, and **Programs**.
- **App Launcher:** switch between consoles and applications.
- **Global Actions:** create new tasks, events, notes, or persons.
- **Notifications** (bell icon): view alerts for tasks, approvals, and case updates.

Course Objectives

By the end of this training, you will have hands-on experience managing a case through C-FIRST! navigation. You will gain practical skills in completing processes related to person management, petition filing, court orders, searching and uploading documents, and managing service referrals.

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 users apply DCS policies and procedures to C-FIRST!.

Icon	Description
	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 introduces the C-FIRST! dashboard homepage, including its buttons and icons. Learners will perform the different steps in the Legal process and learn to navigate the Case screen components. The **Homepage** displays widgets and global features specific to your role. The widgets you see depend on your role:

- Case managers see *Today's Tasks, My Cases, and Next Court Hearing Due*.
- Supervisors see *Today's Tasks, Items to Approve, My Workers Case Load, and My Workers Tasks*.

After completing this module, you will be able to:

- Log into C-FIRST! and use the Homepage widgets and global features to manage your daily workload
- Locate cases using the Cases tab list view filters and customize the list view display
- Navigate a case screen using the Related List Quick Links to access case records
- Navigate a Treatment Case screen and identify case-type-specific section

Lesson 1: Logging into C-FIRST! and Homepage Overview

Before you can begin working on a Legal Case you must successfully log in as the Assigned Attorney/ Court Liaisons, Paralegals or Legal Assistants to C-FIRST! and understand how your assigned role determines what you can see and do in the system. Your role grants you specific permissions to view Cases, create records, and submit work for supervisory approval. The homepage displays a set of role-based widgets that provide a snapshot of your daily workload, including your assigned tasks, cases, programs, and upcoming court hearings.

Each widget provides quick access to key information without navigating away from the homepage. You can switch between views within a widget, expand a widget to see full record details, and select individual records directly from the homepage.

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 Today's Tasks widget displays Today, My Tasks, All Overdue, Completed within Last 7 days, and Delegated Tasks views. The **View All** button allows users to view all the tasks with due dates equal to today.

Next Court Hearing Due: This widget on the homepage provides details about the next court hearings assigned to the Assigned Attorney.

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.

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 across 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.

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.

Learning Objectives

- Login to the C-FIRST! application using valid credentials
- Identify the components displayed on the Homepage
- Review the various Related Lists on a case screen

Task 1: Log In to the C-FIRST! Application

You will open C-FIRST! in your web browser and log in with your DCS credentials. The Homepage displays after a successful Login.

1. Open your web browser and navigate to the C-FIRST! application URL provided by your administrator. The C-FIRST! Login screen displays.
2. Click the **Username** field, enter *your assigned DCS username*.
3. 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: 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 Case details.

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 **Cases 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 may vary based on your user role and permissions.

Task 3: Navigate the Today's Tasks Widget

The Today's Tasks widget displays tasks assigned to you and provides four views for filtering your task list. You will switch between the views, review the task data displayed in each, and expand the task list to see full details.

1. From the **Homepage**, locate the **Today's Tasks** widget. The widget displays a list of tasks assigned to you.
2. Select the arrow in the top right corner of the **Today's Tasks** widget and select *Today* from the dropdown menu.
3. The **Today's Tasks** view displays tasks with due dates equal to the current date. Each task displays the **Subject** and the associated record ID.
4. Select the arrow in the top right corner of the **Today's Tasks** widget and select *Today's Tasks* from the dropdown menu.
5. The **Today's Tasks** view displays all pending and worklisted tasks assigned to you.
6. Select the arrow in the top right corner of the **Today's Tasks** widget and select *All Overdue* from the dropdown menu.
7. The **All Overdue Tasks** view displays tasks where the due date has passed and the status is not completed.
8. Select the arrow in the top right corner of the **Today's Tasks** widget and select *Completed Within Last 7 Days* from the dropdown menu.

9. The **Completed Within Last 7 Days** view displays tasks you completed within the last 7 days. Each task displays the **Subject, Date Completed**, and associated record ID.
10. Select the arrow in the top right corner of the **Today's Tasks** widget and select *Delegated Tasks* from the dropdown menu.
11. Select the **View All** hyperlink at the bottom of the **Today's Tasks** widget. C-FIRST! navigates to the **Task** tab, which displays the full list of task records in a list view.
12. From the Task list view, select the **Split View** option from the **Select list display** button. The split view format displays with the list of tasks on the left and the selected task's details on the right.
13. Select a task from the left column of the split view. The task detail screen displays on the right side. The details include **Subject, Name, Related To, Due Date, Status, Priority, Last Modified Date/Time**, and **Last Modified By**.
14. Select the **Home** tab in the navigation bar. The **Homepage** displays.

Task 4: Review Next Court Hearing Due Widget

The Legal Supervisors and Legal Staff can monitor upcoming court hearings through a homepage widget. You will access this widget to understand how C-FIRST! tracks statutory timeframes for court appearances.

1. From the **Homepage**, locate the **My Cases** widget. The widget displays a list of open cases assigned to you.
2. Locate the **Next Court Hearing Due** widget on the **Homepage**. The widget displays a bar graph of upcoming court hearings.
3. Review the bar graph. The horizontal axis displays **Next Court Hearing Within** categories: 7 days, 30 days, and 90 days. The vertical axis displays the **Record Count** of court orders in each category.
4. Select the **View Report** hyperlink in the bottom left-hand corner of the **Next Court Hearing Due** widget. The expanded **Next Court Hearing Due** report displays a count of all court orders assigned to you within 7 days, 30 days, or 90 days.
5. Review the report columns which may include **Case ID**, **Hearing Date**, **Hearing Type**, and **Assigned Worker**. This report supports compliance with statutory timeframes.

6. Note that C-FIRST! provides notice to staff when court deadlines approach. This functionality addresses the requirement to monitor statutory timeframes and notify staff.

Lesson 2: Global Search and Case Lookup

The **Cases List View** displays case records in C-FIRST! and provides filters to help you locate specific cases. You access it by selecting the **Cases** tab from the navigation bar. The default view, **Cases (Recently Viewed)**, displays case records you have recently accessed and includes columns such as **Case ID**, **Case Name**, **Case Type**, **Case Status**, **Case Open Date**, **Case Close Date**, and **County**.

C-FIRST! provides several pre-built list views that filter cases by type or status. These views include **Open Cases**, **Treatment Cases**, **Permanency Cases**, **Adoption Cases**, **Permanent Guardianship Cases**, **Investigation**, and **Bright Futures Cases**. Each view displays columns relevant to its case type. You can also create cases manually from a **Person** record using the **New Case** button.

In this lesson, you need to locate case records and person records within C-FIRST!. This lesson teaches you how to use the global search functionality and apply filters to find specific records.

Learning Objectives

- Navigate to the Cases List View
- Switch Between List View Filters

Task 1: Navigate to the Cases List View

You will navigate to the **Cases** tab and review the **Cases (Recently Viewed)** list view. This is the default view that displays case records you have recently accessed, along with key identifying information.

1. Select the **Cases** tab from the navigation bar. The **Cases (Recently Viewed)** list view displays.
2. Review the columns displayed in the list view: **Case ID**, **Case Name**, **Case Type**, **Case Status**, **Case Open Date**, **Case Close Date**, and **County**. Each row represents a case record you have recently accessed.
3. Select the **Case ID** hyperlink for a case record in the list. The case record detail screen displays.

4. Select the **Cases** tab to return to the **Cases (Recently Viewed)** list view. The list view displays.

Task 2: Switch Between List View Filters

C-FIRST! provides pre-built list views that filter cases by status or type. You will switch between several views to understand what each filter displays and identify columns unique to specific case types.

1. From the **Cases (Recently Viewed)** list view, select the view name displayed at the top of the list. The list of available views displays, including *Open Cases*, *Treatment Cases*, *Permanency Cases*, *Adoption Cases*, *Permanent Guardianship Cases*, and *Bright Futures Cases*.
2. Select *My Open Cases*. The list view updates to display case records filtered by **Case Status** equals *Open*.
3. Select the view name and choose *Treatment Cases*. The **Treatment Cases** list view displays case records filtered by **Case Type** equals *Treatment*.
4. Select the view name and choose *Permanency Cases*. The **Permanency Cases** list view displays case records filtered by **Case Type** equals *Permanency*. The columns include **Case ID**, **Case Name**, **Case Open Date**, **Case Type**, **Case Subtype**, and **Case Status**.
5. Select the view name and choose *Adoption Cases*. The **Adoption Cases** list view displays case records filtered by **Case Type** equals *Adoption*. The columns include **Case ID**, **Case Name**, **Case Type**, **Case Status**, **Case Open Date**, **Case Closed Date**, **Closure Reason**, and **County**.
6. Select the view name and choose *Recently Viewed* to return to the default view. The **Cases (Recently Viewed)** list view displays.

Lesson 3: Navigating Case Records

A case in C-FIRST! contains multiple sections of information including case details, involved persons, and case history. The **Case** screen displays information about the cases. Let's view the descriptions of elements displayed on this screen:

- **Case Status:** This displays the status of the case.
- **Case Type:** This displays the type of the case.

- **Assigned Worker:** This displays the name of the Primary Assigned worker on the case.
- **Related Lists Quick Links:** This section contains hyperlinks that let users view and access information related to the cases like Permanency Activities, Case Documentation, Court Order & Hearings, Case History etc.



Win!

The hyperlinks in the **Related List Quick Links** section provide access to detailed information on the Associated Cases, Case History, and Case Related Activities without having to leave the main Case screen.

- **Case Information:** This section displays Case Details and the System Information sections. It includes details like the Case ID, Case Open Date, Restricted, Case Closure Reason, Created By etc.
- **Case Summary:** This section (only available in Treatment, Investigation and Bright Futures cases) displays an AI-generated case summary at the top of the screen. The summary highlights the circumstances that led to the creation of the case and outlines the recent developments affecting the family and child. The screen displays details about Provider and Person Location, Case Persons, Court Details, Assessments and Placements.
- **Timeline:** This section displays interactive timeline chart highlighting significant Case Related Activities and displays them in chronological order. Click on any of the events to open it in a separate screen to view details of the event.
- **Attachments:** This section displays all the files that are attached to the case record. Users can Download Files, Basic File Upload, Advanced File Upload, Merge Files and Search within the listed attachments.
- **Case Person Timeline:** The section displays an AI generated visual timeline about the person and Theme. The interactive chart has clickable data points that open a panel to the right with detailed information. Timeline can be zoomed in/out to capture multiple days/years or go down to the times of task creation in a single day. Users can filter and customize the timeline chart using two dropdown fields:

- Name: Select from a list of available Case Persons
- Theme: Choose from predefined themes relevant to child welfare analysis. There are various themes for the user to select.

Lesson Objectives

- Navigate from Task to Related Case
- Understanding Case Record Layout
- Accessing Case Detail Sections
- Use Related List Quick Links

Task 1: Navigate from Task to Related Case

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

1. On the **Tasks** list view, click the **task subject** for the Case assignment. C-FIRST! opens the **Task Details** screen.
2. Locate the **Related To** field. This field displays the Case associated with the task.
3. Click the **Related To** hyperlink. C-FIRST! navigates to the **Case Details** screen for the Investigation.
4. Review the Case information to understand what action is required.
5. Click the browser back button to return to the **Task Details** screen. C-FIRST! displays the task record.



System Tip!

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

Task 2: Understanding Case Record Layout

1. Enter a Case ID or name in the **Search Bar** and select the case from results. The **Case Record** detail screen opens.
2. Identify the record header at the top of the screen. The header displays the **Case Status**, **Case Type**, and **Assigned Worker**. These fields provide quick reference information.

3. Locate the **Related Lists Quick Links** section below the record header. Related lists show connected records such as persons, placements, and case documents.
4. Locate the section with different tabs like **Case Information**, **Case Summary**, **Timeline** or **Attachments**, and **Case Person Timeline** on the screen.

Task 3: Accessing Case Detail Sections

1. Navigate to the **Treatment Case** record page.
2. Scroll down to the **Case Information** section of the Case record. Fields related to case identification display here.
3. Review the **Case ID** field. The field displays read-only.
4. Locate the **Case Status** field in the case information section. The current status of the case displays.
5. Find the **Case Open Date** field and note the date value. This date indicates when the case was opened in C-FIRST!.
6. Find the **Region** and **County** fields indicating the DCS office responsible for the case.
7. Scroll down to locate additional detail sections on the screen. Sections include **Closure Recommendation** and **Closure Disposition**.

Task 4: Viewing Related Persons on a Case

1. Scroll down the **Case Record** page.
2. Click the **Persons** related list. This list displays all persons connected to the case.
3. Review the column headers in the **Persons** list view. Headers may include **Name**, **Role**, **Relationship**, and **Status**.
4. Select a person name link to open the person record. The **Person Record** detail screen opens in a new view.

Task 5: Use Related List Quick Links

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

1. On the **Case Details** screen for the Case, scroll down to locate the **Related List Quick Links** section.
2. Click the **Persons** hyperlink in the **Related List Quick Links** section. C-FIRST! displays the list of persons associated with the Case.

3. Click the **browser back** button or the **Case name** hyperlink to return to the **Case Details** screen.
4. Click the **Assessment** hyperlink in the **Related List Quick Links** section. C-FIRST! displays the list of assessments for the Case.
5. Click the **browser back** button or the **Case name** hyperlink to return to the **Case Details** screen.
6. Use the Related Lists hyperlinks to also view Plans, Placements, Court Orders, Petitions, Case Related Activities etc.

**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.

Knowledge Check!

Question 1: Which of the following statements about the C-FIRST! Dashboard is correct?

- A. The App Launcher is used to bookmark favorite screens for quick access.
- B. The "Global Search Bar" allows users to search for records across multiple objects, including Intake records, cases, and persons.
- C. The "Today's Tasks" widget displays items needing approval from the logged-in user.
- D. The "My Workers Case Load" widget is visible to all users, showing their own case load.

Question 2: Which of the following correctly represent the categories in the horizontal axis **Next Court Hearing Within** widget?

- A. 7 days, 30 days, and 90 days
- B. 10 days, 20 days, and 50 days
- C. 10 days, 40 days, and 90 days
- D. 15 days, 45 days, and 90 days

Question 3: From the Cases (Recently Viewed) list view, which action opens a specific case record's detail screen?

- A. Select the view name at the top and choose **Open Cases**
- B. Select the **Case ID** hyperlink for a case record
- C. Select the **Cases** tab again to refresh the list
- D. Select the **Case Name** columns in the list view

Question 4: Which of the following fields on a task always links to the primary record requiring action?

- A. Case ID field
- B. Case Information field
- C. Case Status field
- D. Related To field

Module 2: Person Management

C-FIRST! consolidates all person data under a single **Persons** related list on the Case. There are two types of Person Records; Person Type Person and Staff.

A **Person record** represents the system-wide profile for an individual, accessible under the **Persons** tab. This record stores key biographical and demographic data such as name, date of birth, addresses, contact information, medical history, and more. Each individual involved with DCS—whether as a child, parent, relative, or foster parent—has a single, enduring Person record that persists across all system interactions. Furthermore, the Person record includes a Person Type attribute, distinguishing individuals as either **Person** (citizen/client), **Staff** (DCS employee) or **Providers**.

A **Staff record** represents records for a Client, Staff, or Service Provider, accurately capturing their roles and responsibilities. These records include information (but not limited to) like background checks, training hours, actual hours worked, type of work by category of services/tasks (e.g. sitting with children, organizing space, etc.), references, emergency contacts, demographics, confidentiality statements, availability, status (Active / Inactive), start and end date, the Certification Letter that is required before the start of the service, and documentation of the annual re-certification process.

This module covers the end-to-end process of managing Person Records in C-FIRST!. It begins with searching for existing Person Records before creating new ones, a critical step that prevents duplicate records in the system. When a search confirms no existing record, the module walks through creating a new Person Record, generating a Person ID (PID), and establishing the appropriate Person Type.

After completing this module, you will be able to:

- Create a New Person record
- Create a Person Type Person record and generate their PID
- Document Citizenship Status of the person

- Capture the ICWA details for Native American children
- Add a Program to a Treatment Case

Lesson 1: Creating New Person Records

When a person search confirms no existing record, users must create a new Person Record in C-FIRST!. C-FIRST! requires an exhaustive existing person search. The existing person search is required to prevent duplicate records and confirm you have complete history on all Case participants. Creating accurate Person Records with complete demographic information is critical for Case Management, federal reporting, and future Case matching.

Lesson Objectives:

- Search for an Existing Person Record
- Create a new Person Record
- Create a Person Type Record
- Generate a Person ID (PID)

Task 1: Search for an Existing Person Record

1. From the homepage, click the **Home** dropdown and select **Person** tab. The **Persons** list view displays.
2. Click the **New** button located in the upper right corner. The **Search for a Person** screen displays.
3. Enter last name in the **Last Name** field.
4. Enter first name in the **First Name** field.
5. Click the **Search** button. C-FIRST! executes the search and displays matching results in the **Search Results** section.
6. Review the search results list for potential matches. Each result displays the person's name, date of birth, and SSN (last four digits).
7. If a matching record displays, select the **Person Name** hyperlink to open and review the record details. The **Person Detail** screen displays.
8. If no match exists, select the **Clear** button to reset the search fields. All search criteria fields clear.

Task 2: Create a Person Record

1. Click the **Home** dropdown, then click the **Person** tab. The **Persons** list view displays the list of persons in C-FIRST!

- including details like Name, PID, Gender Identity/Expression, Gender at Birth, Age, Custody Status and Ethnicity.
2. Click **New** to add child as a person. The **Search for a Person** pop-up displays.
 3. Enter child's first name and last name in the **First Name** and **Last Name** fields to search for a duplicate record.
 4. Click **Search**. The search generates a list of approximate matches. **Note:** This field also accepts text entry.
 5. Click **New Person**. The **New Person** pop-up displays. Enter the mandatory details into the sections to create a new person.
 6. Click the **First Name** field and enter a first name.
 7. Click the **Last Name** field and enter last name.
 8. Click the **Gender at Birth** dropdown and select the gender.
 9. Click the **Date of Birth Unknown** dropdown and select No.
Note: If you do not know the date of birth you will need to select Yes for this field.
 10. Click the **Date of Birth** field and enter the birthdate. **Note:** If **Date of Birth** is listed and **Date of Birth Verified** is Yes, then **Source of Birth Verification** is a required field.
 11. Click the **Ethnicity** dropdown and select ethnicity. The options in the dropdown are:
 - Hispanic or Latino
 - Not Hispanic or Latino
 - Unable to Determine
 12. Click the **Race** field, then click the right arrow icon to select the race of person from the **Available** section. The options in the Available section are:
 - Abandoned
 - American Indian or Alaska Native
 - Asian
 - Black or African American
 - Declined
 - Native Hawaiian or Other Pacific Islander
 - White
 - Unknown
 13. Click **Save**. The person record is created.

**System Tip!**

A Case Person cannot be validated and associated to the case without generating a PID. The case person summary screen displays details about the person and the various related lists.

The **Dual Adjudication Status** is displayed when custody status is active and has an active program with Custodial JJ program type. The **Days in Custody** field calculates the total days a child has been in custody, summing consecutive custody episodes

Task 3: Generate a Person ID (PID)

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

1. On the **Person Details** screen, locate the **Generate PID** button in the action bar.
2. Click the **Generate PID** button. C-FIRST! displays a confirmation dialog.
3. Click **Confirm**. C-FIRST! assigns a unique Person ID and displays it in the **Person ID** field.
4. Note the generated **Person ID** value for your records. This ID will be used to reference the individual throughout the Case.

**System Tip!**

Verified SSNs support accurate identity matching across the system and with external interfaces such as the Department of Safety and Homeland Security. If you are unable to verify the SSN during creation, leave the **Verified** field as *No* and document the reason in case notes.

Task 4: Create a Person Type Record

1. Click the **Person Type** hyperlink from the **Person Related Lists Quick Links** section. The **Person Type** screen displays.
2. Click **New** to add a new Person Type record. The **New Person Type** pop-up displays.
3. Select from the following Person Types:

- **Person:** Record Type for capturing Client Information
- **Staff:** Record Type for capturing Staff Information



System Tip!

Users can select the **Person** radio button to capture client information.

PID of a Person must be generated before creating a Person Type record.

4. Select the **Person** radio button and click **Next** to proceed. The **New Person Type: Person** pop-up displays.
5. The **Person** field is auto populated with the individual's name.
6. The **Record Type** field defaults to **Person**.
7. The **Is Person Validated** field is calculated upon save.
8. Click the **Human Trafficking Survivor** dropdown and select an option.
9. Click the **Living Arrangement** dropdown and select appropriate option. The options in the dropdown are:
 - Group home or residential treatment setting
 - Married two parent household with one biological/adoptive and one stepparent
 - Married two parent household, with two biological/adoptive parents
 - Nonparent relative caregiver household (includes relative foster care)
 - Nonrelative caregiver household (includes non-relative foster care)
 - Other setting (hospital, secure facilities, etc.)
 - Single parent household mother with other adult (grandparent, uncle, aunt, unrelated adult, etc.)
 - Single parent household, father only
 - Single parent household, father with other adult (grandparent, uncle, aunt, unrelated adult, etc.)
 - Single parent household, mother only
 - Two parent household, marital status unknown
 - Unmarried two parent household with one biological/adoptive parent and one cohabitating partner
 - Unmarried two parent household with two biological/adoptive parents

- Unknown
10. Click the **Status** dropdown and select an appropriate option.
The options in the dropdown are:
 - Active
 - Inactive
 11. Click the **Tribal Affiliation** dropdown and select an option.
 12. Click **Save**. The Person Type record is saved.

**System Tip!**

The **Is Person Validated** field displays if the person has a PID and is validated in C-FIRST!.

Task 5: Review Records for Completeness

Ongoing maintenance of person records ensures data accuracy and compliance with federal reporting requirements. As the case progresses, person records will require updates based on new information and changed circumstances.

1. Navigate to the **Person Detail** screen. The record displays.
2. Review the **Details** tab for completeness of demographic information. The tab displays all record fields.
3. Identify any blank required fields that need completion. Required fields display visual indicators.
4. Check that **Date of Birth** is populated. The field displays a date.
5. Check that **Gender** is populated. The field displays a selection.
6. Check that **Race** has at least one selection. The field displays the race information.
7. Check that **Ethnicity** is populated. The field displays a selection.
8. Review the **Relationships** related list for completeness. The list should show parents and siblings.
9. Review the **Person Address** related list for a current address. At least one address with **Primary** checked should display.
10. Review the **Identity Documents** related list. Verify SSN and birth certificate records exist if documented.
11. Select the **Edit** button to add any missing information. The record enters edit mode.
12. Complete any blank fields identified during the review. The fields accept the entries.

13. Click **Save**. C-FIRST! saves the completed information.

Lesson 2: Managing Case Person

You can associate multiple persons to a Case, track their roles, and document information such as visitation waivers. In this lesson, you will review Case Person history, complete the detail fields, document Citizenship, and add ICWA record details for a person.

Lesson Objectives:

- View a Person Record History
- Document Citizenship Status
- Create an ICWA Record
- Review ICWA Eligibility

Task 1: View a Person Record History

1. Navigate to the **Person** record. The record displays.
2. Click the **Contact History** hyperlink from the Related List Quick Links section.
3. Review the **Contact History** list view that captures any changes made to the fields of a Person record. It also records the Date and Time of the change, the user who made the change, and the old and new values of the field.
4. Navigate back to the person record and click **Person Type** hyperlink from the Related List Quick Links section.
5. Click **Person Type Person** from the list view. The Person type record displays.
6. Click the **History** tab below the Related List Quick Links section.
7. Review the list of changes made to the person type record. Each entry displays the date, user, and fields changed.
8. Select a history entry to view the details of what was changed. The change detail displays old and new values. Use the history information to understand when and by whom changes were made to support audit requirements. The history provides a complete audit trail.

Task 2: Document Citizenship Status

1. Navigate to the **Persons** tab. The **Persons** list view displays.
2. Search or locate the person record in the list view.
3. Click the person's name from the **Name** column. The **Person Detail** screen displays.

4. Click the **Details** hyperlink below the Related Lists. The record enters edit mode with editable fields.
5. Review the **Primary Language** dropdown and select *English* if not already populated. The selection displays.
6. Scroll to the **Additional Information** section. The section displays Immigration and Citizenship fields.
7. Click the **Immigration Status** dropdown and select the status of Immigration. The options in the dropdown are:
 - Conditional Permanent Resident
 - Human Trafficking Victim
 - Lawful Permanent Resident
 - Non-Immigrant
 - Refugee/Asylee
 - Special Immigrant Juvenile
 - Undocumented
8. Click the **Citizenship** dropdown and select the type of citizenship. The options in the dropdown are:
 - US Citizen
 - Not a US Citizen
 - Unknown
 - Qualified Alien
9. Click the **Citizenship Verified** dropdown and select if the citizenship is verified.
10. Click the **Proof of Citizenship** dropdown and select the citizenship proof. The options in the dropdown are:
 - Adoption Decree
 - Affidavit by Parent/Guardian
 - AWW (Assist Worker Web)
 - DHS Form N550
 - DHS Form N560
 - DHS Form N561
 - DHS Form N570
 - Documentation Pending
 - Hospital Record of Birth
 - I-872 American Indian Card
 - Life/Health Insurance showing US as Place of Birth
 - Military Records
 - Not Yet Documented
 - Unable to Obtain Documentation
 - US Birth Certificate
 - US Passport
 - Vital Statistics/EVRS

11. Click the **Proof of Immigration Status** dropdown and select the Immigration proof. The options in the dropdown are:
 - Copy of Visa
 - Executive Office of Immigration Review/Immigration Court Documents
 - I-94
 - Office of Trafficking in Persons Documentation
 - Other Documentation
 - Permanent Resident card
 - U.S. Citizenship and Immigration Services Documents
 - Unable to Obtain Documentation
12. Click **Save**. C-FIRST! validates and saves the updated Citizenship details. A confirmation message displays.

Task 3: Create an ICWA Record

The Indian Child Welfare Act (ICWA) is a federal law passed in 1978 in the United States that aims to keep American Indian children with American Indian families. The ICWA record captures the parent or legal guardian information, tribal affiliations, any involuntary termination/modification of parental rights, permanency options, living arrangements, exit to adoption, and guardianship information and the inquiry details.

Multiple ICWA records can be created for the Person. ICWA details ensure that the placement decisions align with ICWA's goals of preserving the child's cultural identity and maintaining their connection to their tribal community. This helps to safeguard the child's best interests and supports the stability and security of Indian tribes and families.

1. Navigate to the person's **Person Type** record.
2. Click the **ICWA** hyperlink from the **Related Lists Quick Links** section.
3. Click **New** to create a new record.
4. Click the **Start Date** field and enter the start date (not future date) of the ICWA efforts.
5. Click the **Date Learned Child May Be Indian Child** field and enter the date (not future date) when it was learned that the child is or may be an Indian child.
6. Click **Save**. The record is created successfully. You are directed to the newly created ICWA record.

7. Click the **Edit** button. The record enters edit mode with editable fields.
8. In the **General Information** section, enter the **End Date** only when an ICWA record becomes Inactive.
9. Click the **Status** dropdown and select the current status of this record. The options in the dropdown are:
 - Abridged
 - Active
 - Inactive
 - Complete



Process Tip!

- Only a Cultural Affairs Coordinator or Director can mark the **Status** as *Inactive*.
 - If the **Status** is selected as Inactive, then the **Inactive Reason** field is enabled. The options in the dropdown include Court Case Closed, Jurisdiction Transferred, Not Eligible or Enrolled, Not Frequently Recognized Tribe, Other, and Reached Age of 18. User must complete at least one inquiry field.
 - If the **Status** is selected as Abridged, then the **Abridged Reason** field is enabled. The options in the dropdown include Administratively Discontinued, Created in Error, and No Federally Recognized Tribe.
 - Only a Cultural Affairs Specialist can update the **Status** to *Complete*.
 - When the **Status** is set to *Complete* or *Inactive*, then **End Date** field is mandatory.
10. Scroll to the **Inquiries** section and answer the questions about the inquiry status of the **Child, Mother, Father, Child's Custodian**, and **Child's Extended Family**. The fields listed in this section are:
 - Inquired With member?
 - Is the member a Tribal Member
 - Domicile or Residence on a Reservation?
 11. Scroll to the **Additional ICWA Information** section and click the **Confirmation of ICWA Status?** dropdown and confirm the

Indian Child Welfare Act (ICWA) status. The other fields in this section are:

- Court Determination that ICWA Applies?
- Date Court Made ICWA Determination
- Cultural Affairs Specialist
- Member or Eligible for Membership?

12. Scroll down to the **Tribal Affiliations** section and click the **Potential Indian Tribe(s)** field and enter the potential tribal affiliations of the child.
13. Click the **Court Determined Indian Tribe(s)** and enter tribal affiliations section to identify Court Determined Indian Tribe(s).
14. Click the **Indian Tribe(s) Sent Notice** and enter tribal affiliations section to identify Indian Tribe(s) that were Sent Notice.



Process Tip!

Use the **Non-Federally Recognized Tribe(s)** field to enter any associated Non-Federally Recognized Tribe(s).

15. Scroll down to the **Notifications** section and answer the questions in the fields by selecting the **Yes** or **No** options. The questions in this section are:
 - **Parent(s)/Custodian(s) Sent Legal Notice?:** Captures whether the parent(s) or custodian(s) have been sent legal notice regarding proceedings.
 - **Request to Transfer to Tribal Court?:** Captures whether a request has been made to transfer the case to a tribal court.
 - **Indian Tribe Sent Legal Notice?:** Captures whether the Indian tribe has been sent legal notice regarding proceedings.
 - **Court Approved Transfer?:** Captures the court's determination regarding the request to transfer the case to a tribal court.
 - **State Court Determined Good Cause Exists?:** Captures whether the state court has determined that good cause exists to deny the transfer of the case to a tribal court.
 - **Tribal Court Declined Transfer?:** Captures whether the tribal court has declined the transfer of the case.

- **Court Order ID:** Captures the ID of the Court Order that includes language specific to Good Cause.
- **Parents Objected to Transfer?:** Captures whether the parents have objected to the transfer of the case to a tribal court.
- **Good Cause to Deny Transfer:** Captures the basis for the court's finding of good cause. The options in the **Available** multi-select box are:
 - Indian child's cultural connections with the Tribe or Reservation
 - Proceeding is at an advanced stage
 - Socio-economic conditions or any negative perception of Tribal , BIA social services or judicial systems
 - There were prior proceedings involving the child for which no petition to transfer was filed
 - Transfer could affect the placement of the child
 - Prior proceedings involving the child for which no Petition to transfer was filled
- **Placement preferences exist for child and were available?:** Captures the ICWA Placement Preference.
- **Placement Preferences Existing and Available for Child:** Captures placement preferences existing and available for an Indian Child. The options in the **Available** multi-select box are:
 - Extended Family
 - Tribal Foster Home
 - Indian Foster Home through Non-Tribal Agency
 - Institution Approved or Operated by Tribe or Tribal Organization
 - Placement Complying with Tribal Order of Preference
- **Has each placement of child complied with placement preferences?:** Captures history of placement compliance.
- **Court determined good cause existed to depart from placement preference?:** Captures courts determination that clear and convincing Evidence existed to depart from Placement Preference.

- **Good Cause Placement Preference:** Captures the basis for the court's finding of good cause to depart from placement preference. The options in the **Available** multi-select box are:
 - Extraordinary physical, mental, or emotional needs of child (specialized services needed)
 - Request of child
 - Request of parent
 - Sibling attachment that could be maintained by placement
 - Unavailability of suitable placement after a determination by the court that a diligent search was conducted to find suitable placements
 - **Court found active efforts by agency?:** Captures whether court found active efforts by agency.
16. Scroll down to the **Removals Under ICWA** section and answer the questions in the fields by selecting the **Yes** or **No** options.
- **Expert Witnesses Testimony?:** Captures whether expert witnesses have provided testimony in the case
 - **Court Found Emotional/Physical Risk?:** Captures whether the court has found that there is an emotional or physical risk to the child involved in the case
 - **Court Finding of Active Efforts?:** Captures whether the court decided active efforts were made
17. Scroll to the **TPR/Surrender of Rights Under ICWA** section and answer the questions about TPR or a voluntary surrender of the rights from the **Mother**, **Father**, and **Other**. The fields listed in this section are:
- TPR/Surrender of Rights?
 - Court Found Emotional/Physical Risk?
 - Court Finding of Active Efforts?
 - Expert Witnesses Testimony?
18. In the **Exit to Adoption** section, click the **Date BIA Notified** field and enter date (not future date) when the Bureau of Indian Affairs (BIA) was notified in the case.
19. Click **Save**. The ICWA details are successfully saved.

Task 4: Review ICWA Eligibility

1. Navigate to the **Person Type** screen for the child/youth. The record displays.
2. Click the **Details** hyperlink below the Related Lists. The record enters edit mode with editable fields.
3. Scroll to the **Special Populations** section. The section displays indicator fields.
4. Review the **ICWA Eligible** dropdown and select the appropriate value.
5. If ICWA applies, select the **Tribal Affiliation** field and search for the applicable tribe.
6. Click Save. C-FIRST! saves the special population indicators.

Lesson 3: Program Management

Program and Task Management in C-FIRST! organizes the ongoing work assigned to a Case. Programs capture service eligibility and planning data, while tasks track individual assignments with due dates and statuses. Programs in C-FIRST! track the services and interventions associated with children on a Treatment Case. Users create, activate, and close Program records to document the full lifecycle of each program assignment.

Lesson Objectives

- Manually Create a Case
- Create a Custodial JJ Program Record
- Activate a JJ Program Record

Task 1: Manually Create a Case

1. Click the **Persons** tab from the home dropdown and the Persons list view displays.
2. Click the desired **Person** record by clicking on the hyperlink in the **Name** column.
3. Click the **Cases** hyperlink from the **Related List Quick Links** section. The Cases list view displays a list of cases associated to the Person.



System Tip!

A Case cannot be created for a non-validated Person and for a Person without Person Type Person.

4. Click **New Case** on the right-side of the screen to create a new case record and the **Case Edit** screen open in a new tab.
5. Click the **Case Type** dropdown, select either **Adoption, Bright Futures, Permanent Guardianship** or **Treatment**.
6. The **Case Open Date** and **Case Status** are auto populated.
7. Enter relevant details in the **Assigned To, Region** and **County** fields.
8. Click **Save**. A new case is created.

Task 2: Create a New Program Record

You will create a new Program record in the Treatment Case.

1. Click **New** on the **Programs** List View. C-FIRST! displays a record type selection screen.
2. Click **Next**. C-FIRST! displays the **New Program** pop-up.
3. Enter *Jaylen Carter####* in the **Case Person** field. C-FIRST! displays matching results.
4. Select *Jaylen Carter####* from the results. C-FIRST! populates the **Child Name** field based on the selected Case Person.
5. Click the **Program Type** dropdown. C-FIRST! displays available program types. Based on the type of program certain fields will become available. The options in the dropdown are:
 - Custodial DNN/Unruly
 - Custodial JJ
 - FCIP
 - FSS
 - ICJ Incoming
 - Independent Living
 - Non-Custodial JJ
 - Predisposition/Order of Reference
 - RCP (Non-Stipend)
 - RCP (Stipend)
6. Review the **Program Status** field. C-FIRST! defaults the value to *Pending*.
7. Enter the **Program Start Date**.

8. Click **Save**. C-FIRST! saves the record and displays the **Programs** Detail screen for the newly created record.
9. Review the **Program ID** field. C-FIRST! displays an auto-generated identification number that is not editable.

Task 3: Activate a Program Record

The FSS Program for Jaylen Carter#### is ready to be activated. You will update the status and complete all required fields on the **Programs** Detail screen for the Carter#### family.

10. Click the **Program Status** dropdown on the **Programs** Detail screen. C-FIRST! displays available statuses.
11. Select *Active* from the **Program Status** dropdown.
12. Enter 07/15/2025 in the **Program Start Date** field.
13. Click the **Referral Source** dropdown. C-FIRST! displays available referral sources.
14. Select *CPS* from the **Referral Source** dropdown.
15. Enter your name in the **Assignee** field. C-FIRST! displays matching results.
16. Select your name from the results. C-FIRST! populates the **Supervisor** field based on the selected supervisor of the Assignee.
17. Click **Save**. C-FIRST! saves the record and updates the **Programs** Detail screen.
18. Review the **FSS Intervention Level** field. C-FIRST! populates this field based on the **Referral Source** value and the latest FAST Assessment score for the Case Person.



System Tip!

C-FIRST! creates a task for the assigned user to complete the Program record when the **Assignee** field is populated.



Process Tip!

For FSS Programs with a **Referral Source** of *Court* or *JJ*, C-FIRST! automatically sets the **FSS Intervention Level** to *Intensive*. For a **Referral Source** of *CPS*, the level is determined by the latest FAST Assessment score for the Case Person. Only users with the Child Program Supervisor, Regional Director, Executive

Director, Assistant Commissioner, or Business Administrator role can update the **FSS Intervention Level** field.

Task 4: Close a Program Record

The FSS Program for Jaylen Carter#### has concluded. You need to close the Program record and document the closure details for the Carter#### family's Treatment Case.

19. Navigate to the **Programs** Detail screen for the FSS Program record created in the previous task.
20. Click the **Program Status** dropdown. C-FIRST! displays available statuses.
21. Select *Closed* from the **Program Status** dropdown.
22. Enter *01/15/2026* in the **Program End Date** field.
23. Click the **Program Closure Reason** dropdown. C-FIRST! displays available closure reasons.
24. Select the closure reason from the **Program Closure Reason** dropdown.
25. Enter the closure summary in the **Program Closure Summary** field. Document the reason for program closure and any relevant details.
26. Click **Save**. C-FIRST! saves the record and updates the **Programs** Detail screen.



System Tip!

If no other Program records on the Treatment Case have a **Program Status** of *Active* or *Pending*, C-FIRST! automatically creates a task to close the Treatment Case.



Process Tip!

Once a Program record is closed, only users with the Child Program Supervisor, Regional Director, Executive Director, Assistant Commissioner, or Business Administrator role can edit the record. All other users will see the record as read only.

Knowledge Check!

Question 1: Which of the following is one of the types of cases in the Case Type dropdown?

- A. Adoption
- B. SPG
- C. Court Ordered
- D. Investigation

Question 2: How does C-FIRST! populate the Supervisor field on a Program record?

- A. C-FIRST! populates the Supervisor field based on the Referral Source
- B. C-FIRST! populates the Supervisor field based on the selected Assignee
- C. C-FIRST! defaults the Supervisor to the current logged-in user
- D. The user manually selects the Supervisor from a lookup search

Question 3: Why is it important to search for existing person records before creating a new one in C-FIRST!?

- A. The system requires a search before allowing record creation
- B. To prevent duplicate records that affect data quality and reporting
- C. To verify the person has a valid Social Security Number
- D. To check if the person has a criminal background

Module 3: Petition Filing and Management

This module covers key aspects of filing and managing all petition types including adoption, TPR, subsidized permanent guardianship, and DN/unruly petitions. Users will learn how to create new petitions, select appropriate petition categories, complete petition details with legal grounds and case specifics, and file petitions through C-FIRST!.

The petition types while creating a new petition available depend on the case type:

- **Treatment Cases:** *TPR Petition and D/N, Unruly, and Other*
- **Permanency Cases:** *Adoption Petition and Subsidized Permanent Guardianship*

The Treatment Case is a family case which can include a combination of Custodial, Non-Custodial, and Juvenile Justice activities. Reference the script for any additional details. When you change the **Petition/Motion Status** to *Completed*, C-FIRST! auto worklists a corresponding court order and hearing record with the children and persons involved carried over from the petition.

After completing this module, you will be able to:

- Create different types of petitions by selecting the correct petition type
- Complete the Related List for the Petition by adding children, respondents, or proposed providers
- Manage and update completed petitions

Lesson 1: Petition Types & Categories

Petition records in C-FIRST! allow legal staff to document and track court filings for Termination of Parental Rights and Adoption proceedings. This lesson covers creating different types of petition records and how to access the Related Lists.

Lesson Objectives:

- Access Court and Legal Records
- Create Termination of Parental Rights (TPR) Petition
- Create Adoption Petition
- Create Subsidized Permanent Guardianship (SPG) Petition

- Review the Case Related Activities for Legal Tasks

Task 1: Access Court and Legal Records

A Treatment Case contains multiple related lists for court and legal documentation. You will navigate to these components to understand the structure of legal record-keeping in C-FIRST!. When searching for records, use specific identifiers such as case numbers or person names for faster results. Global Search returns results across all record types in C-FIRST!.

1. Login as the Assigned Attorney and select the **Cases** tab from the main navigation bar. The **Cases** list view displays.
2. Click the required Treatment Case. The case record displays in the list.
3. Scroll down to the **Related List Quick Links** section on the Case record.
4. Click the **Court Orders/Hearings** hyperlink in the Related List Quick Links section. This link provides access to all court orders and hearing records for the case.
5. Click the **Petitions and Motions** hyperlink in the Related List Quick Links section. This link provides access to petition and motion records filed in court.
6. Click the **Case Related Activities** hyperlink in the Related List Quick Links section. This link displays consolidated tasks including court-related activities.
7. Click the **Case Conferences** hyperlink in the Related List Quick Links section. This link provides access to legal staffing and case consultations.

Task 2: Create Termination of Parental Rights (TPR) Petition

The Non-DCS Petitioner field captures if the petitioner is somebody outside of DCS (not required since most of the time the petitioner will be DCS). Remember that when adding Children on the TPR Petition, the Respondents related list captures the Respondent's role in relation to the child (i.e. Alleged Mother or Father). There is no limit on the number of respondents than can be added for the Child.

1. Click the **Petitions and Motions** hyperlink from the **Related List Quick Links** section of a case. The **Petitions and Motions** screen displays.

2. Click **New** to add a new TPR petition record. The **New Petition/Motion** pop-up displays.
3. Click the **TPR Petition** radio button to capture the TPR Petition details and then click **Next**. The **New Petition/Motion: TPR Petition** pop-up displays.
4. Click the **Petition/Motion Date** field and enter the required date.
5. Click the **Searched Putative Father Registry?** dropdown and select the required option.
6. The default option in the **Petition/Motion Status** dropdown is *Pending*.
7. Click the **Court County** dropdown and select county name.

**System Tip!**

- Select **Unknown** if the county details are not known.
 - Select **Out of State** if the case court is outside the state of Tennessee.
 - Click the **View all dependencies** hyperlink to view all the fields associated with the **Court County** field.
-
8. Click the **Court State** dropdown and select **Tennessee**.
Note: In case the court is outside the United States of America, select **Other**.
 9. Click the **Court Type** dropdown and select appropriate option.
The options in the dropdown are:
 - Administrative Court
 - Chancery Court
 - Circuit Court
 - Criminal Court
 - General Sessions Court
 - Juvenile Court
 10. Click the **Judge** dropdown and select appropriate option.
- Note:** Click **Other** if the required judge is not listed in the dropdown.
11. Click the **Docket Number** field and enter the required number.
 12. Click the **Notes** field and enter the appropriate notes.
 13. Click **Save**. The TPR petition record is created.

Step 1: Updating TPR Petition Status

1. Click the **Pencil** icon next to the **Petition/Motion Status** field on the **Petition/Motion** screen. The fields become editable.
2. Click the **Petition/Motion Status** dropdown and select **Completed**. The options in the dropdown are:
 - Abridged
 - Completed
 - Pending
 - Worklisted
3. Click **Save**. The TPR Petition record status is closed.

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

Task 3: Create Adoption Petition

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

- Completed
- Pending
- Worklisted

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

12. Click the **Petition/Motion Date** field and enter the required date.
13. Click the **Court Type** dropdown and select appropriate option.
14. Click **Save**. The Adoption petition record is created. Once Completed, only specific user roles (supervisors, business admin, etc.) can edit the Adoption Petition. C-FIRST will also worklist an Adoption Court Order.

Task 4: Create Subsidized Permanent Guardianship (SPG) Petition

Upon Completion of the Petition, the system will automatically create an SPG Court Order.

1. Login as the Court Liaison, Permanency Specialist, or Legal Staff Member, and from the homepage, click the **Home** dropdown and select **Cases**.
2. Click the required Permanency Case from the **Recently Viewed** lists. The **case** screen displays.
3. Click the **Petitions and Motions** hyperlink from the **Related Lists Quick Links** section. The Petitions and Motions list view displays.
4. Click **New** to create a Subsidized Permanent Guardianship Petition.
5. Select from the following record types:
 - **Adoption Petition:** Captures Adoption Petition details
 - **D/N, Unruly, and Other Petition/Motion:** Captures D/N, Unruly, and Other Petition and Motion details

- **Subsidized Permanent Guardianship Petition:**
Captures Subsidized Permanent Guardianship Petition details
6. Select the **Subsidized Permanent Guardianship Petition** radio button and click **Next**. The **New Petition/Motion: Subsidized Permanent Guardianship Petition** pop-up displays.
 7. Click the **Petition/Motion Date** field and enter the date.
 8. Click the **Court County** dropdown and select appropriate option.
 9. Click the **Court State** dropdown and select the required state.
 10. Click the **Court Type** dropdown and select appropriate option.
The options in the dropdown are:
 - *Administrative Court*
 - *Chancery Court*
 - *Circuit Court*
 - *Criminal Court*
 - *General sessions Court*
 - *Juvenile Court*
 11. Click the **Notes** field and enter the appropriate notes.
 12. The default status of the **Petition/Motion Status** dropdown is **Pending**. The options in the dropdown are:
 - Abridged
 - Completed
 - Pending
 - Worklisted
 13. Click the **Docket Number** field and enter the required number.
 14. Click the **Judge** dropdown and select appropriate option.
 15. Click **Save** to complete creating the petition. The petition is created.

Task 5: Review the Case Related Activities for Legal Tasks

C-FIRST! consolidates all case-related tasks, including court and legal activities, into a single list view. You will access this consolidated view to understand how legal tasks integrate with other case activities for the family.

1. From the Treatment Case record, scroll to the **Related List Quick Links** section. The quick links display on the case detail screen.

2. Select the **Case Related Activities** hyperlink. The **Case Related Activities List View** opens.
3. Review the list view columns displaying **Subject, Due Date, Priority, Status, Assigned To,** and **Related To**. These columns show all tasks consolidated for the case.
4. Note that court-related tasks will appear in this list alongside case management tasks. The consolidated view allows tracking of all case activities in one location.
5. Observe the **Related To** column which indicates whether the task connects to a Court Order, Petition, or other case record. This helps identify the source of each task.
6. Review any existing tasks with **Due Date** values to understand statutory timeframe tracking; informed by business processes & policy.
7. Click the **Back** button or navigate back to the Treatment Case record. The case detail screen displays.

Lesson 2: Related Lists

The **Related List Quick Links** section on a Petition, or Court Order or Case Person provides rapid access to all related records such as Children, History, Associated Petitions and Court Orders.

Lesson Objectives:

- Add Custody Details
- Add Children to the Petition (or Court Order)
- Add the Persons involved
- Link Associated Court Orders and Hearings
- View Court Order and Hearing history
- Link Associated Petitions and Motions
- Add Information about the Charges
- Add details for Proposed Providers

Task 1: Custody

1. Navigate to the recently created petition or court order.
2. Click **Custody** hyperlink from the **Related Lists Quick Links** section. The Custody List View displays the list of Custody records created for a Person, including details such as Custody ID, Custody Status, Start Date, and End Date. **Note:** Users can also navigate to Custody hyperlink from the Person Type Person screen for a child/youth.

3. Click **New** to add a custody record. The **New Custody** pop-up displays.
4. The default status of the **Custody Status** dropdown is **Pending**. The options in the dropdown are:
 - Active
 - Inactive
5. Enter the **Start Date**.
6. Click the **Custody End Reason** dropdown and select an option. The options in the dropdown are:
 - Adoption
 - Death of child
 - Emancipation
 - Guardianship
 - Living with other relative(s)
 - Not Applicable
 - Reunified with parent, primary caretaker
 - Runaway
 - Transfer to another agency
7. Click the **Custody Type** dropdown and select an option. The options in the dropdown are:
 - DCS – JJ
 - DCS – Social Services
 - DCS – Unruly
 - Non-DCS Custody
8. Enter the **Commitment County**.
9. Click the **VPA Custody** dropdown and select an option.

**Process Tip!**

C-FIRST! defaults VPA Custody? to No when a new Custody record is created. Change this value to Yes only if the custody is based on a Voluntary Placement Agreement.

10. Click the **Caregiver 1 Name** field and enter the name.
11. Select the **Relationship**.
12. Click the **Reason for Custody** multi-select box. The picklist options are:
 - Caretaker's Significant Physical/Emotional Impairment
 - Child Alcohol Use
 - Child Behavior Problem

- Child Drug Use
- Child Requested Placement
- Child's Parent/Legal Guardian's Identity is Unknown.
- Child's Whereabouts Unknown - Not Runaway
- Clinically Diagnosed with a Health, Behavioral or Mental Health Condition
- Death of Parent/Caretaker
- Dependency - Incarceration of Parent
- Domestic Violence
- Failure to Return
- Inadequate Access to Medical Services
- Inadequate Access to Mental Health Services
- Inadequate Housing
- Medical Neglect
- Neglect
- Physical Abuse
- Prenatal Exposure - Alcohol
- Prenatal Exposure - Drug
- Psychological or Emotional Abuse
- Runaway
- Sex Trafficking: Child is a Victim at the Time of Removal
- Sexual Abuse
- Voluntary Relinquishment for Adoption

13. Click the **Family Structure** dropdown and select the appropriate option. The Options in the dropdown are:

- Married Couple
- Not Applicable
- Single Female
- Single Male
- Unable to Determine
- Unmarried Couple

14. Click the **Environment at Removal** dropdown and select the appropriate option. The options in the dropdown are:

- Detention Center
- Legal Guardian Household
- Medical/Mental Health Facility
- Other
- Parent Household
- Relative Household

- Relative Legal Guardian Household
15. Select if it has been **Reported to Law Enforcement**.
 16. Click **Save** or **Save & New** to complete adding the Custody details.

**System Tip!**

- Start Date is required when the Custody Status is Active. C-FIRST! also validates that the Start Date does not overlap with the Start Date and End Date timeframe of another Custody record for the same child.
- Only a Business Administrator can abridge a Custody Record and edit an Inactive or Abridged Custody Record.

Task 2: Children

1. Click the **Children** hyperlink from the **Related List Quick Links** section of the new TPR Petition record. The **Children** screen displays.
2. Click **New Child** to add a new child record.
3. Click the **Case Person ID** field and enter name of child.
4. Click **Save**. The child record is created.

Task 3: Person Involved

1. Click the **Person Involved** hyperlink from the **Related List Quick Links** section of the new Court Order. The **Person Involved** screen displays.
2. Click **New Person** to add a new person record. The **New Person Involved: Person Involved- Court Order/Hearing and Petition/Motion** pop-up displays.
3. Click the **Case Person ID** field and enter name.
4. Click the **Role** dropdown and select appropriate option. The other options in the dropdown are:
 - Adoptive Father
 - Adoptive Mother
 - Alleged Father
 - Attorney (Other)
 - Biological Father
 - Biological Mother
 - CASA
 - Child

- Child's Attorney
- Custodian
- Domestic Violence Liaison
- Former Adoptive Father
- Former Adoptive Mother
- Foster Parent
- Guardian ad litem
- Legal Father
- Legal Guardian
- Maternal Relative/Kin
- Non-Relative
- Other Professional
- Parent Attorney (Father)
- Parent Attorney (Mother)
- Paternal Relative/Kin
- Putative Father
- Safe Baby Court Coordinator
- Service Provider

5. Click **Save**. The record is created.

Task 4: Collaterals Involved

1. Click the **Collaterals Involved** hyperlink in the **Related List Quick Links** section of the Court Order. The **Collaterals Involved** screen displays.
2. Click **New** to create a new collateral record. The **New Collateral Involved** pop-up displays.
3. Click the **Collateral ID** and enter the required Collateral ID.



System Tip!

Users can add a new Collateral if they are unable to find them in C-FIRST!. Enter details like Collateral First and Last Name, Role, Address and Case ID to create a new Collateral.

4. Click **Save** to save the record. The record is created.

Task 5: Associated Court Orders/Hearings

1. Click the **Associated Court Orders/Hearings** hyperlink from the **Related List Quick Links** section of the new Petition record. The **Associated Court Orders/Hearing** screen displays.

2. Click the **Associated Court Order/Hearing** field and select the Court Order/Hearing ID.
3. Click the **Reason for Associated Order/Hearing** dropdown and select a reason for associating this Order/Hearing. The options in the dropdown are:
 - Custody
 - Disposition
 - Final Adjudication
 - Initial Reasonable Efforts
 - Yearly Reasonable Efforts
 - Other
4. Select if there is **Severe Abuse** related to the case.
5. Click **Save**. The Court Order and Hearing record is associated.

Task 6: Court Order/Hearing History

The Court Order/Hearing History captures changes made to the fields of a Court Order record. It also records the date and time of the change, the user who made the change, and the old and new values of the field. It provides an audit history of changes to high impact fields within the Court Order or Hearing.

Task 7: Associated Petitions/Motions

1. Login as the Case Manager or Legal Staff Member and navigate to the recently created SPG petition and motion. Click the **Associated Petitions/Motions** hyperlink from the **Related Lists Quick Links** section.
2. Click **New** to add a new Associated Petitions/Motions record. The **New Associated Petitions/Motions** pop-up displays.
3. Click the **Associated Petitions/Motions** field and enter the petition ID to be associated.
4. Click **Save** or **Save & New** to complete adding the details of the Associated Petitions/Motions.

Task 8: Charges Information

To add detailed information about the legal charges or allegations brought against an individual in relation to the welfare of a child:

1. Click the **Charges Information** hyperlink in the **Related List Quick Links** section of the Juvenile Justice and ICJ Court Order just created. The Charges Information List View displays the list

of Charges on the Case, including details such as Charge Information ID, Charge Type, TCA Code, and Date of Occurrence.

2. Click **New** to create a new record. The **New Charges Information** pop-up displays.
3. Click the **Charge Type** field and enter appropriate charge type.
4. Click the **Date of Occurrence** field and enter date.
Note: The **TCA Code** field is auto populated on save.
5. Click the **Status** dropdown and select **Completed**.



System Tip!

The **Abridge Reason** and **Abridge Notes** fields display only when users select the **Abridged** option.

6. Click **Save** to complete creating the Charges Information record. To make any updates or edits, click the **pencil** icon.

Task 9: Proposed Providers

1. Login as the Court Liaison, Permanency Specialist, or Legal Staff Member and navigate to the recently created SPG petition and motion. Click the **Proposed Providers** hyperlink from the **Related Lists Quick Links** section. The Proposed Providers List view displays all proposed providers for Guardianship, including details such as the Person Involved ID, PID, and Name.
2. Click **New Proposed Provider** to capture the Person details that are considered for Guardianship of the child.
3. Click the **Case Person ID** field and enter the name.
4. Click the **Agency** field and enter name of agency.
5. Click **Save** or **Save & New** to complete adding the proposed provider's name.

Lesson 3: Managing Petitions and Motions

Petition records in C-FIRST! allow legal staff to document and track court filings and make a request of the court. You will learn to document petitions and motions filed and understand how these legal documents connect to court orders and case planning.

Lesson Objectives:

- Complete a Petition
- Document Petition Details and Allegations

Task 1: Complete a TPR Petition

After a TPR petition has been filed with a Juvenile Court the next step is to update the petition record with the filing details and set the status to reflect that the petition is complete.

1. Verify the **TPR Petition** detail screen displays from the previous task.
2. Review the **Custody Date** field. C-FIRST! populates this field from the latest Custody record for the attached child.
3. Click the **Judge** dropdown. C-FIRST! displays a list of judges filtered by County.
4. Select a judge from the filtered list. C-FIRST! populates the **Judge** field.
5. Enter the **Docket Number**.
6. Enter appropriate comments in the **Notes** field.
7. Click the **Petition/Motion Status** dropdown. C-FIRST! displays available statuses.
8. Select *Completed*. C-FIRST! populates the **Petition/Motion Status** field.
9. Click **Save**. C-FIRST! saves the record and displays the **Petitions and Motions** list view.

**System Tip!**

The Custody Date field is a formula field populated from the latest Custody record for the attached child. This field is not editable by the user.

The **Judge** dropdown filters available judges based on the county selected in the **Court County** field. If the assigned judge does not display in the list, select *Other* and enter the judge's name in the **Other Judge** field that displays.

C-FIRST! automatically creates a TPR Court Order and Hearing record when the TPR Petition status is set to *Completed*. C-FIRST! copies the Children, Persons Involved, Court Type, and

Docket Number from the petition to the new court order record.

Task 2: Document Petition Details and Allegations

The D/N, Unruly, and Other Petition/Motion includes various petition and motion types to capture requests such as Petition for Removal, Unruly, Violation of Aftercare, and more. You will document the petition details including the neglect allegations against the adult.

1. Navigate to the **Petition/Motion** record created for the dependency petition.
2. Click the **Pencil** icon in the **Allegations** field.
3. Enter the text describing the Petition allegations.
4. Click the **Non-DCS Petitioner** field and enter the name of the petitioner.
5. Enter the **Docket Number**.
6. Click the **Provider** field and enter the name of the Provider.
7. Select **Save** to save the updated allegation details.

Knowledge Check!

Question 1: Which of the following roles can abridge a Custody Record and edit an Inactive or Abridged Custody Record?

- A. Business Administrator
- B. Case Manager
- C. Regional Director
- D. No one

Question 2: When creating a Termination of Parental Rights (TPR) Petition, which option should you select if the required judge is not listed in the Judge dropdown?

- A. Unknown
- B. Out of State
- C. Other
- D. Pending

Question 3: What happens automatically after an Adoption Petition record's Petition/Motion Status is updated to Completed?

- A. The petition is deleted and recreated as a Court Order

- B. An Adoption Court Order and Hearing record is automatically worklisted
- C. The case status changes to Closed
- D. The Judge field becomes read-only immediately

Question 4: When an SPG (Subsidized Permanent Guardianship) Petition is completed, what does the system automatically create?

- A. An SPG Case Conference record
- B. An SPG Court Order
- C. A new Permanency Case record
- D. A TPR Petition record

Module 4: Court Order Creation and Management

In this module, users will get hands on experience in creating all court order types including adoption, guardianship, TPR, Juvenile Justice (JJ) and dependency/neglect/unruly orders. Users will learn how to complete hearing details and parental rights termination forms, attach required legal documentation, and process orders through approval workflows for various case types.

How do you create and update TPR, Adoption and Guardianship court orders?

You create court orders from the **Court Orders and Hearings** related list on a case, or you open a worklisted court order that C-FIRST! created when a petition was completed. Each court order captures the **Court Order Type, Hearing Type, Date of Hearing, Date of Decision, Court County, Court State, and Court Type**.

C-FIRST! requires the **Date of Decision** when the **Court Order/Hearing Status** is set to *Completed*. The D/N and JJ Court Orders also include fields that track custody implications: **Court Order Started DCS Custody, Order Addresses Reasonable Efforts**, and **Contrary to Welfare**.

After completing this module, you will be able to:

- Create different types of Court Orders by selecting the correct court order type
- Upload and attach required legal documentation
- Manage Court Orders

Lesson 1: Court Order Types & Categories

Court Orders and Hearings document legal decisions and proceedings that direct actions regarding the care and protection of children. C-FIRST! provides the ability to create, track, and associate multiple types of Court Order and Hearing records within a Case.

Learning Objectives

- Navigate to the Court Orders and Hearings list view from a Case record
- Create a D/N, Unruly, and Other Court Order/Hearing record
- Create a TPR Court Order and Hearing record
- Create an Adoption Court Order and Hearing record
- Create a JJ and ICJ Court Order and Hearing record
- Create a Subsidized Permanent Guardianship Court Order and Hearing record

Task 1: Viewing All Court Orders and Petitions from the Case

C-FIRST! provides the ability to view all associated court orders and petitions for a case in a consolidated list view. You will access this view to understand the complete legal history available for the case.

1. Navigate to the Treatment Case record from the **Cases** tab. The Treatment Case Detail Screen opens.
2. Click the **Court Orders/Hearings** hyperlink.
3. Review the court orders in the list including all court orders associated with the Treatment case that appear in chronological or entered order.
4. Click the **Petitions and Motions** hyperlink from the Related List Quick Links.
5. Review all the petitions filed for the case. Petitions document the legal filings that initiate or modify court proceedings.
6. Click the **Case Related Activities** from the quick links to view all tasks including court deadlines. Note that the Case Related Activities list also consolidates court-related tasks.

Task 2: Creating a Dispositional Hearing Court Order

The first court appearance for the children occurs shortly after removal to establish temporary custody. You will create a court order record to document this preliminary hearing and the judge's orders regarding the children's placement.

1. Navigate to the case by selecting the **Cases** tab.
2. Scroll to the **Related List Quick Links** section on the case record.
3. Click the **Court Orders/Hearings** hyperlink. The **Court Orders/Hearings List View** opens.
4. Select the **New** button on the Court Orders/Hearings list view. The **New Court Order/Hearing** pop-up opens.

5. Select **D/N, Unruly, and Other Court Order and Hearing** radio button and click **Next**.
6. Click the right arrow icon in **Court Order Type** to move **Dispositional Hearing Order** from the **Available** section to the selected list. The options in the dropdown are:
 - Adjudicatory Hearing Order
 - APD Final Order
 - APD Initial Order
 - Appeal
 - Attachment
 - Bright Futures Judicial Review Order
 - Bright Futures Permanency Hearing Order
 - Detention Hearing Order
 - Dispositional Hearing Order
 - Ex Parte Protective Custody Order
 - ICPC Regulation 7 Expedited Placement Decision Order
 - Judicial Review Hearing Order
 - Order Authorizing Disclosure of Patient Records
 - Order Authorizing Medical Care
 - Order Authorizing Treatment
 - Order Confirming UCCJEA Jurisdiction
 - Order Confirming Voluntary Placement Agreement
 - Order for Participation by Video Conference
 - Order for Service by Publication
 - Order for Trial Home Placement
 - Order of Commissioner's Designee--Admin
 - Order of Continuance
 - Order of Divestment Pursuant to ICPC
 - Order of Reference
 - Order of Voluntary Dismissal
 - Order to Place Pursuant to ICPC
 - Order to Show Cause
 - Order Transferring Jurisdiction
 - Order Vacating Custody
 - Other Order
 - Permanency Hearing Order
 - Permanency Plan Ratification Order
 - Predisposition Order
 - Preliminary Hearing Order

- Protective Custody Order
 - Protective Order (Records)
 - Qualified Residential Treatment Facility Review Order
 - Removal Order
 - Safe Baby Court Order
 - Temporary Restraining Order
 - TPR Appeal
 - Unsubsidized Permanent Guardianship Order
7. Click the right arrow icon in **Hearing Type** to move **Dispositional** from the **Available** section to the selected list. The options in the dropdown are:
- Adjudicatory Hearing
 - Appeal for Fair Hearing (Removal from Foster Home)
 - Appeal for Fair Hearing (Subsidy - AA)
 - Appeal for Fair Hearing (Subsidy - RC)
 - Appeal for Fair Hearing (Subsidy - SPG)
 - Appeal for Fair Hearing (Substantiated Perpetrator)
 - Appeal to Commissioner's Designee
 - Best Interest Determination
 - Bright Futures Foster Care Review Board Hearing
 - Bright Futures Judicial Review Hearing
 - Bright Futures Permanency Hearing
 - Discharge Hearing
 - Dispositional
 - Ex Parte Hearing
 - Foster Care Review Board
 - Hearing (Other)
 - ICPC Regulation 7 Hearing
 - Judicial Review
 - Permanency Hearing
 - Permanency Plan Ratification
 - Preliminary
 - QRTP Hearing
 - Release Hearing
 - Review of Transitional Living Plan
 - Show Cause Hearing
 - Trial Home Visit Hearing
 - UCCJEA Hearing
 - Unsubsidized Permanent Guardianship Hearing

- Violation of Probation/Aftercare Hearing
8. Click the **Court State** dropdown and select **Tennessee**.
 9. The default option in the **Court Type** dropdown is **Juvenile Court**. The other options in the dropdown are:
 - Administrative Court
 - Chancery Court
 - Circuit Court
 - Criminal Court
 - General Sessions Court
 - Juvenile Court
 10. Select the **Judge** based on the selected Court County and State.
 11. Click the **Court Order Started DCS Custody** dropdown and select an option.
 12. Click the **Order Addresses Reasonable Efforts** dropdown and select an option. The options in the dropdown are:
 - Initial Reasonable Efforts to Prevent Removal
 - No
 - Ongoing Reasonable Efforts
 13. The default status of the **Court Order/Hearing Status** dropdown is **Pending**. The options in the dropdown are:
 - Abridged
 - Completed
 - Pending
 - Worklisted
 14. Enter the **Date of Hearing**.
 15. Click the **Contrary to Welfare** dropdown and select an option.
 16. Click the **Removal Due to Methamphetamine Exposure?** dropdown and select an option.
 17. Click **Save** to create the Dispositional court order.

**System Tip!**

When system date is 7 days from Date of Hearing, a text message is sent to each person on the Persons Involved Related List where Case Person Status is *Active* and Receive Hearing and Meeting Alerts is *Yes*.

Task 3: D/N, Unruly, Other Court Order

1. Login as the Assigned Attorney or Legal Staff member, and from the homepage, click the **Home** dropdown and select **Cases**.
2. Click the required case from the **Recently Viewed Cases** list, the case screen displays.
3. Click **Court Orders and Hearings** from the **Related Lists Quick Links** section. The Court Orders and Hearings list view displays.
4. Click **New** to create a new D/N Court Order.
5. Select from the following record types:
 - **D/N, Unruly, and Other Court Order and Hearing:** Captures D/N, Unruly, and Other Court Order and Hearing details
 - **Juvenile Justice and ICJ Court Order:** Captures Juvenile Justice and ICJ Court Orders details
 - **Subsidized Permanent Guardianship Court Order and Hearing:** Captures Subsidized Permanent Guardianship Court Order and Hearing details
6. Select **D/N, Unruly, and Other Court Order and Hearing** radio button and click **Next**. The **New Court Order/Hearing: D/N, Unruly, and Other Court Order and Hearing** pop-up displays.
7. Click the right arrow icon in **Court Order Type** to select the required options from the **Available** section to the selected list. The options in the dropdown are:
 - Adjudicatory Hearing Order
 - APD Final Order
 - APD Initial Order
 - Appeal
 - Attachment
 - Bright Futures Judicial Review Order
 - Bright Futures Permanency Hearing Order
 - Detention Hearing Order
 - Dispositional Hearing Order
 - Ex Parte Protective Custody Order
 - ICPC Regulation 7 Expedited Placement Decision Order
 - Judicial Review Hearing Order

- Order Authorizing Disclosure of Patient Records
- Order Authorizing Medical Care
- Order Authorizing Treatment
- Order Confirming UCCJEA Jurisdiction
- Order Confirming Voluntary Placement Agreement
- Order for Participation by Video Conference
- Order for Service by Publication
- Order for Trial Home Placement
- Order of Commissioner's Designee--Admin
- Order of Continuance
- Order of Divestment Pursuant to ICPC
- Order of Reference
- Order of Voluntary Dismissal
- Order to Place Pursuant to ICPC
- Order to Show Cause
- Order Transferring Jurisdiction
- Order Vacating Custody
- Other Order
- Permanency Hearing Order
- Permanency Plan Ratification Order
- Predisposition Order
- Preliminary Hearing Order
- Protective Custody Order
- Protective Order (Records)
- Qualified Residential Treatment Facility Review Order
- Removal Order
- Safe Baby Court Order
- Temporary Restraining Order
- TPR Appeal
- Unsubsidized Permanent Guardianship Order



System Tip!

When Court Order Type is *Ex-Parte Protective Custody Order* or *Removal Order* and the Order Addresses Reasonable Efforts is *No*, then C-FIRST! creates a task to complete **Reasonable Efforts to Prevent Removal**.

8. Click the right arrow icon in **Hearing Type** to select the required option from the **Available** section to the selected list.

The options in the dropdown are:

- Adjudicatory Hearing
- Appeal for Fair Hearing (Removal from Foster Home)
- Appeal for Fair Hearing (Subsidy - AA)
- Appeal for Fair Hearing (Subsidy - RC)
- Appeal for Fair Hearing (Subsidy - SPG)
- Appeal for Fair Hearing (Substantiated Perpetrator)
- Appeal to Commissioner's Designee
- Best Interest Determination
- Bright Futures Foster Care Review Board Hearing
- Bright Futures Judicial Review Hearing
- Bright Futures Permanency Hearing
- Discharge Hearing
- Dispositional
- Ex Parte Hearing
- Foster Care Review Board
- Hearing (Other)
- ICPC Regulation 7 Hearing
- Judicial Review
- Permanency Hearing
- Permanency Plan Ratification
- Preliminary
- QRTP Hearing
- Release Hearing
- Review of Transitional Living Plan
- Show Cause Hearing
- Trial Home Visit Hearing
- UCCJEA Hearing
- Unsubsidized Permanent Guardianship Hearing
- Violation of Probation/Aftercare Hearing

9. Click the **Court State** dropdown and select the required option.

10. The default option in the **Court Type** dropdown is **Juvenile Court**. The other options in the dropdown are:

-
- Administrative Court
- Chancery Court
- Circuit Court
- Criminal Court

- General Sessions Court
 - Juvenile Court
11. Click the **Court Order Started DCS Custody** dropdown and select appropriate option.
 12. Click the **Order Addresses Reasonable Efforts** dropdown and select appropriate option. The options in the dropdown are:
 - Initial Reasonable Efforts to Prevent Removal
 - No
 - Ongoing Reasonable Efforts
 13. The default status of the **Court Order/Hearing Status** dropdown is **Pending**. The options in the dropdown are:
 - Abridged
 - Completed
 - Pending
 - Worklisted
 14. Click the **Date of Hearing** field and enter the required date.
 15. Click the **Contrary to Welfare** dropdown and select the required option.
 16. Click the **Removal Due to Methamphetamine Exposure?** dropdown and select the required option.
 17. Click **Save** to create the court order.



System Tip!

When system date is 7 days from Date of Hearing, then an SMS is sent to each person on the Persons Involved Related List where Case Person Status is **Active** and Receive Hearing and Meeting Alerts are **Yes**.

Task 4: JJ and ICJ Court Order

The Juvenile Justice and ICJ Court Order captures the legal directives issued by a judge about a juvenile's case, including placement, treatment, and rehabilitation. These orders ensure that the juvenile justice system provides the required interventions and support for youth involved in the system.

1. Login as the Assigned Attorney or the Legal Staff member, and from the homepage, click the **Home** dropdown and select **Cases**.

2. Click the required case from the **Recently Viewed Cases** list.
the case screen displays.
3. Click the **Court Orders and Hearings** hyperlink from the **Related Lists Quick Links** section. The Court Orders and Hearings list view displays.
4. Click **New** to create a new Juvenile Justice and ICJ Court Order.
5. Select from the following record types:
 - **D/N, Unruly, and Other Court Order and Hearing:**
Captures D/N, Unruly, and Other Court Order and Hearing details
 - **Juvenile Justice and ICJ Court Order:** Captures Juvenile Justice and ICJ Court Orders details
 - **Subsidized Permanent Guardianship Court Order and Hearing:** Captures Subsidized Permanent Guardianship Court Order and Hearing
6. Select **Juvenile Justice and ICJ Court Order** radio button and click **Next**. The **New Court Order/Hearing: Juvenile Justice and ICJ Court Order** pop-up displays.
7. Click the **Order Type** dropdown and select the required option.
The options in the dropdown are:
 - Adjudicatory
 - Article VI Hearing/Order
 - Attachment
 - Bright Futures Permanency Hearing Order
 - Bright Futures Services Review Order
 - Combined Adjudicatory and Dispositional
 - Court Review
 - Custody Rescission Order - No Hearing
 - Detention Hearing Order
 - Discharge Hearing
 - Dispositional
 - Foster Care Review Board
 - Judicial Review Order
 - Order for Discharge
 - Order for Release
 - Order Transferring Jurisdiction to Criminal Court
 - Order Vacating Custody
 - Permanency Hearing Order
 - Permanency Plan Ratification Order

- Probation
 - QRTP
 - Qualified Residential Treatment Facility Review Order
 - Release Hearing
 - Review of Institutional Placement Order Pursuant to Article VI
 - Transfer Hearing
 - Trial Home Visit Hearing/Order
 - Violation of Probation/Aftercare Hearing Order
8. Click the **Court Name** dropdown and select appropriate option.
 9. Click the **Court County** field and select appropriate option.
 10. Click the **Court State** dropdown and select the required state.
 11. Click the **Judge** dropdown and select appropriate option.
 12. Click the **Current Level of Supervision** dropdown and select appropriate option.
 13. Click the **Order Addresses Reasonable Efforts** dropdown and select the required option. The options in the dropdown are:
 - Initial Reasonable Efforts to Prevent Removal
 - No
 - Ongoing Reasonable Efforts

Note: If **Order Addresses Reasonable Efforts** is selected as **Initial Reasonable Efforts to Prevent Removal** or **Ongoing Reasonable Efforts**, then the **Reasonable Efforts Granted?** field is enabled and mandatory.



System Tip!

When Reasonable Efforts Granted? is *Yes* and Court Order/Hearing Status is *Completed*, then at least one Court Order type must be linked on the Associated Court Orders and Hearings Related List.

14. The default status of the **Court Order/Hearing Status** dropdown is **Pending**. The options in the dropdown are:
 - Abridged
 - Completed
 - Pending
 - Worklisted
15. Click the **Order Date** field and enter date.
16. Click the **Docket Number** field and enter number.

17. Click the **Maximum Discharge Date** field and enter date.
18. Click the **Date of Next Hearing** field and enter date.
19. Click the **Court Order Started DCS Custody** dropdown and select if the DCS Custody has started.
20. Click the **Contrary to Welfare** dropdown and select if it is contrary to welfare.
21. Click the **Commitment Type** dropdown and select appropriate option in the **Disposition Details** section. The options in the dropdown are:
 - Determinant
 - Indeterminant
22. Click the **Serious Youthful Offender** dropdown and select the required option.
23. Click the **Disposition Notes** field and enter appropriate notes.
24. Click **Save** to create the court order.

Task 5: Subsidized Permanent Guardianship (SPG) Court Order and Hearing

Now, let's create a Subsidized Permanent Guardianship Court Order and Hearing and capture orders issued by a court to appoint a guardian with a subsidy. The court evaluated factors such as the best interests of the child, the suitability of the proposed guardian, and the circumstances leading to the need for guardianship.

Note: A SPG Court order can also be automatically created upon completion of the SPG Petition. But not all SPG Court Orders will have a Petition preceding it.

1. Login as the Court Liaison, Permanency Specialist, or Legal Staff Member, and from the homepage, click the **Home** dropdown and select **Cases**.
2. Click the required **Permanency case** from the **Recently Viewed Cases** lists. The **Case** screen displays.
3. Click **Court Orders and Hearings** from the **Related Lists Quick Links** section. The Court Orders and Hearings list view displays.
4. Click **New** to create Subsidized Permanent Guardianship Court Orders and Hearings.
5. Select from the following record types:

- **D/N, Unruly, and Other Court Order and Hearing:**
Captures D/N, Unruly, and Other Court Order and Hearing details
 - **Juvenile Justice and ICJ Court Order:** Captures Juvenile Justice and ICJ Court Orders details
 - **Subsidized Permanent Guardianship Court Order and Hearing:** Captures Subsidized Permanent Guardianship Court Order and Hearing details
6. Select **Subsidized Permanent Guardianship Court Order and Hearing** radio button and click **Next**. The **New Court Order/Hearing: Subsidized Permanent Guardianship Court Order and Hearing** pop-up displays.
 7. Click the **Date of Decision** field and enter the required date.
 8. Click the **Court Decision** dropdown and select the required option. The options in the dropdown are:
 - Continued
 - Guardianship Approved
 - Guardianship Denied
 - Petition Withdrawn
 9. Click the **Date of Hearing** field and enter the date.
 10. Click the **Docket Number** field and enter the number.
 11. Click the **Notes** field and enter appropriate notes.
 12. The default status of the **Court Order/Hearing Status** dropdown is **Pending**. The options in the dropdown are:
 - Abridged
 - Completed
 - Pending
 - Worklisted
 16. Click the **Court County** dropdown and select appropriate option.
 17. Click the **Court State** dropdown and select the required state.
 18. Click the **Court Type** dropdown and select the required court type. The options in the dropdown are:
 - Administrative Court
 - Chancery Court
 - Circuit Court
 - Criminal Court
 - General sessions Court
 - Juvenile Court

19. Click the **Judge** dropdown and select appropriate option.
20. Click the **Adoption/SPG Subsidy Specialist** field and enter the name of the required subsidy specialist.
21. Click **Save** to complete creating the court order and hearing record. The court order and hearing record is created.
22. Click the **pencil** icon to edit the details in the record. If Guardianship is approved, C-FIRST! automatically creates a Guardianship Case. The subsidy specialist for this case can be selected on the Court Order screen for them to continue the work for this case.

To complete the SPG Court Order:

1. Click the **Details** section of the court order, then click the **pencil** icon in the **Court Order/Hearing Status** field.
2. Click the **Court Order/Hearing Status** dropdown and select **Completed**.
3. Enter the **Date of Decision**, **Court Decision** and **Hearing Date** fields.
4. Click **Save**. C-FIRST! automatically creates a Guardianship Case for the child/youth upon completion of SPG court orders. The Guardianship case is linked through the Associated Cases Related Link.

Note: All the Related Lists for a Court Order are already covered in the Previous module.

Task 6: TPR Court Order and Hearings

The TPR Court Order and Hearing Screen captures the process in which a legal decree is issued by a Court that permanently ends the legal rights of a parent over their child. This is often a critical step in the process of making a child available for adoption or another permanent placement.

TPR Court Order and Hearings are the result of legal proceedings where a court determines that it is in the best interest of the child to terminate parental rights. Grounds for TPR can include severe or chronic abuse or neglect, abandonment, long-term mental illness or deficiency of the parent, long-term alcohol or drug-induced incapacity of the parent, failure to support or maintain contact with the child, and others.

1. Login as the Assigned Attorney, and from the homepage, click the **Home** dropdown and select **Cases**. The **Recently Viewed Cases** screen displays.
2. Click the required **Case ID**. The **Case** screen displays.
3. Click the **Court Orders and Hearings** hyperlink from the **Related List Quick Links** section. The **Court Orders and Hearings** screen displays.
4. Click the new TPR Court Order and Hearings record with the **Court Order/Hearing Status** as **Worklisted**. The **Court Order/Hearing** screen displays.
5. Click the **Pencil** icon next to the **Date of Hearing** field. The fields become editable.
6. Click the **Date of Hearing** field and enter the required date.
7. Click the **Date of Decision** field and enter the required date.
Note: The **Date of Decision** field becomes a mandatory field if the **Court Order/Hearing Status** is set to **Completed**. Add the **Children** and the **Respondents** before completing the record.
8. Click the **Outcome** dropdown and select the required option.
The options in the dropdown are:
 - TPR Denied (All)
 - TPR Granted (All)
 - TPR Multiple Outcomes
9. Click the **TPR Outcome Details** field and enter appropriate notes.
Note: The **TPR Outcome Details** field becomes a mandatory field if the **Court Order/Hearing Status** is set to **Completed**.
10. Click the **Court Order/Hearing Status** dropdown and select **Completed**. The options in the dropdown are:
 - Abridged
 - Completed
 - Pending
 - Worklisted
11. Click the **Court County** dropdown and select appropriate option.
12. Click the **Court State** dropdown and select the required state.
13. Click the **Court Type** dropdown and select appropriate option.
The other options in the dropdown are:
 - Administrative Court
 - Chancery Court

- Circuit Court
 - Criminal Court
 - General Sessions Court
 - Juvenile Court
14. Click the **Docket Number** field and enter the required number.
 15. Click the **Judge** dropdown and select appropriate option. **Note:** Select **Other** if the required judge is not listed in the dropdown and enter the judge's name in the **Other Judge** field.
 16. Click **Save**. The record is created. The new record with TPR Court Order and Hearing record type has the following related lists:
 - Children
 - Person Involved
 - Associated Petitions/Motions
 - Associated Court Orders/Hearings

Note: The information in the **Children**, **Person Involved**, and **Associated Petitions/Motions** hyperlinks are synced with the TPR Petition. Users may associate any other Court Order/Hearing record to the current one by clicking the **Associated Court Orders/Hearings** hyperlink.

Step 1: Add Respondent Details to the TPR Court Order

To complete a TPR Petition, it is mandatory to add at least one child record and the corresponding Respondent for that child. **Note:** Refer to the Children Related List in the Petitions module to view how to add Children details to a Court Order.

1. Click the **Respondents** hyperlink from the **Related List Quick Links** section of the new child record. The **Respondents** screen displays.
2. Click **New Person** to add a new petition respondent record. The **New Person Involved: Petition Respondent** pop-up displays.
3. Click the **Role** dropdown and select the role of the respondent.
4. Click the **Case Person ID** field and select from the list of Persons.
5. Enter the **Attorney Name**.
6. Scroll down to the **TPR Information** section.
7. Select the **TPR Grounds** from the multi-select box.

8. Click **Save**. The Respondent information is saved on the TPR Court Order.

Task 7: Adoption Court Order and Hearing

The Adoption Court Order and Hearing is Worklisted upon completion of the Adoption Petition. If the Court Decision is *Adoption Granted*, then create a Post Adoptive person on the Person record. Once the Adoption is granted by the Court, update the record with court decision.

1. Login as the Permanency Specialist, and from the homepage, click the **Home** dropdown and select **Cases**. The **Recently Viewed Cases** screen displays.
2. Click the required **Permanency Case ID**. The **Case** screen displays.
3. Click the **Court Orders and Hearings** hyperlink from the **Related List Quick Links** section. The **Court Orders and Hearings** screen displays.
4. Click the pending Adoption **Court Order/Hearing ID**. The **Court Order/Hearing** record displays.
5. Click the **Pencil** icon on the **Date of Decision** field. The field becomes editable.
6. Click the **Date of Decision** field and enter the required date.
7. Click the **Court Decision** dropdown and select the required decision. The options in the dropdown are:
 - Adoption Denied
 - Adoption Granted
 - Adoption Withdrawn

Note: On completion of the Court Order with Court Decision as **Adoption Granted**, an Adoption Case is automatically created and linked to the Permanency Case on the Associated Cases related list. On the Adoption Case, the Post Adoptive Person is added as a Case Person.

8. Click the **Court Order/Hearing Status** dropdown and select the required option. The options in the dropdown are:
 - Abridged
 - Completed
 - Pending
 - Worklisted

9. Click **Save**. The record is saved.

**Process Tip!**

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

Lesson 2: Court-Required Forms & Attachments

C-FIRST! tracks custody episodes and relevant documents associated with a Case. Users create and manage these records from the Case record to document court-ordered custody.

Lesson Objectives:

- Document Court Order Details and Custody Determination
- Search for Documents on the Attachments Tab
- Attach Required Legal Documentation
- Upload and Download legal documents
- View and Edit an Attachment Records

Task 1: Navigate to the Custody Related List from a Case Person

To navigate to the Custody related list on a Case Person record to view and manage custody records, follow the steps below.

1. Navigate to the Case record.
2. Click **Case Person** hyperlink from the Related List Quick Links section
3. Click the **Case Person** record for the desired person/child C-FIRST! displays the **Case Person** detail screen.
4. Click **Custody** from the **Related List Quick Links** section. C-FIRST! scrolls to the **Custody** related list.
5. Review the **Custody** list view. C-FIRST! displays columns for **Custody ID**, **Custody Status**, **Start Date**, and **End Date**.

**System Tip!**

C-FIRST! also provides a navigation path to the Custody related list from a Court Order record. Navigate to the Case record, click Court Orders and Hearings from the Related List Quick Links, then click Custody from the Court Order and Hearing record.

Task 2: Review Custody Record Validation Rules and Read-Only Fields

Next, review the Custody detail screen for the person/child to understand how C-FIRST! enforces validation rules and populates read-only fields on the record.

1. Review the **Custody ID** field. C-FIRST! auto generates this unique identifier and it is not editable.
2. Review the **Contrary to Welfare** field. C-FIRST! populates this value from the associated Court Order when one exists, and it is not editable.
3. Review the **Reasonable Efforts to Prevent Removal** field. C-FIRST! populates this value from the associated Court Order when one exists, and it is not editable.
4. Review the **Case Person ID** and **Client Type Person ID** fields. C-FIRST! populates both values from the Case Person record and they are not editable.
5. Scroll down to the **Associated Court Orders/Hearings** related list. C-FIRST! displays any Court Orders and Hearings linked to this Custody record.

**System Tip!**

When an End Date is populated, Custody End Reason is required. When Custody End Reason is populated, End Date is required. C-FIRST! also prevents the End Date from being set to a future date.

**Process Tip!**

When the Custody Type is Non-DCS Custody, the Non-DCS Custody Details field is required. When the Custody Type is DCS - JJ, the Transitioning to Aftercare field is visible and required.

Task 3: Search for Documents on the Attachments Tab

You need to locate a specific document previously uploaded to the 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.
4. Select the desired category to filter results.
5. Click the **Document Date Filter** dropdown. C-FIRST! displays the available date filter options.
6. Select the desired date filter option. The following options are available:
 - After
 - Before
 - On
 - Between
7. Enter the date in the **Document Date** field. If *Between* is selected, enter dates in both the **Document Date** and **Document Date 2** fields.
8. Click **Update**. C-FIRST! filters the attachments list based on the provided search criteria.
9. Review the filtered results in the attachments list.
10. Click **Reset** to restore the attachments list to its original view.
11. 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: Attach Required Legal Documentation

1. Click **Basic Upload** on the **Attachments** tab. C-FIRST! displays the **Basic Upload** pop-up.
2. Review the **Document Date** field, which defaults to the current system date. Update the date if the document was created on a different date.
3. Enter a descriptive name in the **Document Name** field.
4. Click the **Document Category** dropdown. C-FIRST! displays the available category values based on the upload object.
5. Click the **Document Sub-Category** dropdown, if available for the selected category. C-FIRST! displays the sub-category values associated with the selected category.
6. Select the applicable sub-category value.
7. Click **Upload File** to browse for a file on your computer. C-FIRST! opens the file explorer window.
8. Locate and select the file from your computer, then confirm the selection. C-FIRST! displays the selected file name in the pop-up.
9. Click the **Person Association** multi-select box to optionally associate the document with one or more Case persons. C-FIRST! displays all persons associated with the Case.
10. Select the person or persons to associate with the attachment.
11. Enter any relevant information in the **Comments** field.
12. Click **Save**. C-FIRST! creates the attachment record and returns to the **Attachments** tab, where the new file displays in the list.

Task 5: Download Documents from the Attachments Tab

You need to download documents from the Case record for offline review, including a single file and a set of multiple files.

1. Locate the desired attachment in the attachments list on the **Attachments** tab.
2. Click the **Download** button for the individual attachment. C-FIRST! begins downloading the file to your computer.
3. Locate two or more attachments to download together.

4. Click the checkbox next to each attachment you want to include in the download.
5. Click **Download Files**. C-FIRST! packages the selected files into a zip file and begins the download.

**System Tip!**

If the **CSEM Case** checkbox is selected on an attachment, the **Download** button and the selection checkbox for that attachment are disabled. CSEM Case files cannot be downloaded from the system.

Task 6: View and Edit an Attachment Record

Now, review the details of a document uploaded to the Case record and update the comments on the attachment.

1. Click the hyperlink in the **File Name** column for the desired attachment on the **Attachments** tab. C-FIRST! displays the attachment record.
2. Review the **Document Date**, **Document Name**, and **File Name** fields at the top of the record.
3. Review the **Type** field, which indicates the source of the document upload.
4. Review the **Document Category** and **Document Sub-Category** fields.
5. Review the **Graphic Content?** checkbox and the **CSEM Case?** checkbox.
6. Review the **Status** field, which defaults to *Active* upon upload.
7. Review the **Parent Object ID** field to confirm the record to which the attachment is associated.
8. Review the **Person Association** field to confirm which Case persons are linked to the attachment.
9. Update the **Comments** field with any additional information about the attachment.
10. Click **Save**. C-FIRST! saves the updates to the attachment record.

**Process Tip!**

To archive a document uploaded in error, change the **Status** field to *Inactive*. C-FIRST! then displays the **Status Justification** field, which is required before saving. Enter the reason for the status change, such as uploaded in error.

Lesson 3: Managing Court Tasks

C-FIRST! monitors statutory timeframes for court appearances and reports, generating tasks and notifications to ensure compliance. For cases, specific deadlines govern when hearings must occur, when reports are due, and when plans must be reviewed. You will learn to view, manage, and complete court-related tasks. You will also gain knowledge of how C-FIRST! tracks compliance with legal timeframes for the children.

Lesson Objectives:

- Access Tasks from Homepage Widgets
- Create Manual Task for Legal Team Members
- Completing Court-Related Tasks

Task 1: View Court and Legal Tasks from Homepage Widgets

The Homepage includes widgets for viewing pending and overdue tasks related to court events. You will access these widgets to review court-related tasks for the case.

1. Select the **Home** tab from the main navigation bar. The Homepage displays multiple widgets.
2. Locate the **Today's Tasks Widget** on the homepage. This widget displays tasks assigned to you including court-related tasks.
3. Review the **Today's Tasks** section which displays tasks due today including any court deadlines. Tasks display with subject, due date, and priority.
4. Select the dropdown or tab to view **All Overdue Tasks**. This view displays tasks past their due date requiring attention.
5. Locate any court-related tasks by reviewing the **Subject** column. Court tasks may include subjects like court report preparation or hearing reminders.

6. Select the **View All** button on the widget to open the full **Today's Tasks Split View**. The expanded view provides more detail.
7. Review tasks in the split view which display the task list alongside task details. Select a court-related task to view its information.
8. Note that tasks can be filtered and viewed by due date and priority. This helps prioritize court deadline compliance.

Task 2: Create Manual Task for Legal Team Members

C-FIRST! allows you to manually create tasks and assign them to legal team members. You will create a task for the DCS attorney related to the case court preparation.

1. From the **Today's Tasks Widget** or the **Today's Tasks List View**, select the **New Task** button. The **New Manual Task** screen opens.
2. Click the **Subject** field and enter task subject. The subject describes the task purpose.
3. Click the **Due Date** field and enter the date by which the task should be completed. Set an appropriate deadline for court preparation.
4. Click the **Assigned To** field and search for and select the DCS attorney assigned to the case. The task is assigned to the legal team member.
5. Click the **Priority** dropdown and select an option. Priority indicates task urgency.
6. Click the **Comments** field and enter additional details.
7. Click the **Status** field and leave as *Not Started* or set to *In Progress* if work has begun. The status tracks task progress.
8. Click **Save**. The task creates and assigns to the legal team member. Note that the assigned user receives notification of the new task. Manual task creation supports coordination with legal staff.

Task 3: Complete Court-Related Tasks

When court preparation activities are finished, tasks must be marked complete. You will update task status and add completion notes for the case court task.

1. Navigate to **Today's Tasks** from the homepage widget or by accessing the tasks through the Case Related Activities on the case. The task list displays.
2. Locate a court-related task that has been completed. Select the task to open the task detail screen.
3. Review the task details to confirm the required work has been finished. Verify the task subject and description match the completed work.
4. Click the **Status** field and select *Completed*. The status updates to reflect task completion.
5. Enter notes documenting task completion: *Court report submitted to court clerk on. Copy uploaded to case documents* in the **Comments** field.
6. Alternatively, select the **Mark Complete** button on the task record. This quickly updates the status to Complete.
7. Click **Save** if you manually updated fields. The task record saves with the completion status.
8. Note that completed tasks remain visible in the **Completed Within Last 7 Days** view on the homepage widget. This provides a history of recently finished work.
9. Verify the task no longer appears in **Today's Tasks** or **All Overdue Tasks** views. Completed tasks move to completed task views.

Lesson 4: Approval Process and Workflow

Certain records in C-FIRST! require supervisor approval before they can be finalized. This includes permanency plans, safety plans, and other documentation that impacts case decisions. As the Assigned Attorney, you need to understand how to submit records for approval and how supervisors process those approval requests. This lesson covers the approval workflow within C-FIRST!.

Lesson Objectives:

- Submit a Record for Approval
- Access Records From the Items to Approve Widget
- Approve a Record
- Reject a Record and Provide Feedback

Task 1: Access Records from the Items to Approve Widget

1. Click the **Home** tab. The Homepage displays available widgets.
2. Navigate to the **Items to Approve** widget on the homepage. The widget displays pending approval requests.
3. Review the items displayed in the widget including columns for **Record Name, Submitted By, Submitted Date, and Type**. The widget provides an overview of pending approvals.
4. If the submitted permanency plan displays in the widget, note its position. The plan displays if logged in as the approver.
5. Select the **View All** link on the Items to Approve widget. The Items to Approve full list view displays.
6. Review all pending approval requests in the expanded view. The list displays all items awaiting approval action.
7. Note the available actions in the list view including **Approve, Reject, and Reassign**. Action buttons are visible for each item.

Task 2: Approve a Record

1. From the **Items to Approve** list view, locate the record requiring approval. The record displays in the list.
2. Select the **Approve** button next to the record. The Approve Screen displays.
3. Review the record details displayed on the approval screen.
4. Click the **Comments** field and enter your comments. The comments field accepts the supervisory feedback.
5. Click the **Approve** button to finalize the approval. The record is approved.
6. Verify a confirmation message displays. The message confirms the approval was processed.

Task 3: Reject a Record and Provide Feedback

1. Navigate to the **Home** tab and locate the **Items to Approve** widget. The widget displays pending items.
2. Select **View All** to access the full approval list. The expanded list displays.
3. Identify a record that requires revision. The record is identified.
4. Click the **Reject** button next to the record.
5. Click the **Rejection Reason** field and enter an appropriate reason for rejection and provide steps for implementation of feedback.
6. Click the **Reject** button to finalize the rejection. The record is returned to the submitter.

7. Verify that a confirmation message displays indicating the record was rejected. The message confirms the action.
8. Note that the submitter will receive a notification about the rejection with the feedback provided. The system generates an automatic notification.

Knowledge Check!

Question 1: From the **Items to Approve** full list view, which actions are available for each pending approval item?

- A. Approve, Reject, Reassign
- B. Save, Submit, Delete
- C. Close, Escalate, Archive
- D. Edit, Clone, Export

Question 2: What happens when you select multiple attachments 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 3: On completion of the Court Order with Court Decision as Adoption Granted, which of the following actions is automatically created and linked to the Permanency Case on the Associated Cases related list?

- A. SPG Court Order
- B. Adoption Petition
- C. Adoption Case
- D. SPG Case

Question 4: Which date filter options are available in the Document Search section on the Attachments tab in C-FIRST!?

- A. Upload Date and Modified Date
- B. Document Date and Document Date 2
- C. Created Date and Last Accessed Date
- D. Start Date and End Date

Module 5: Associated Orders and Timeline Management

In this module, users will learn to manage related court proceedings, hearings, motions, and legal timelines. Users will learn how to link associated court orders, schedule and track hearings, monitor motion status and approvals, generate legal timelines with milestone tracking, and ensure compliance with court-ordered deadlines.

After completing this module, you will be able to:

- Create custody records and legal status records on case persons
- Use the Legal Timeline to view all legal activities on a case
- Link associated court orders

Lesson 1: Working with Associated Cases and Intakes

The Court Order connects to other records and may be associated with other cases involving family members. Court and legal records may reference multiple associated cases and intake records. You will learn to view and document the associations between the Treatment Case, the investigation that preceded it, and any other related cases to ensure complete legal documentation and court preparation.

Lesson Objectives:

- Link Associated Cases
- Navigate between linked Cases

Task 1: Create an Associated Case Linkage

If the family has other cases in C-FIRST!, such as a prior case or a case for another family member, these can be linked as associated cases. You will create an associated case record to link related cases.

1. From the Treatment Case, scroll to the **Related List Quick Links** section.
2. Click the **Associated Cases** hyperlink. The **Associated Cases** list view displays the **Case ID, Case Type, Case Subtype, Case Status, Assigned Worker**, and **Originating Case**.

3. Click **New** to create a new associated case linkage. The **New Associated Case** screen opens.
4. Click the **Associated Case** field and search for the case to link. Search by case ID, family name, or other criteria.
5. Click **Save**. The associated case record creates and the list view displays the new linkage.

Task 2: Navigating Between Related Cases for Legal Preparation

When preparing for court, workers may need to review information from associated cases and intakes. You will navigate between the Treatment Case and associated records to access relevant legal information.

1. From the Treatment Case, access the **Associated Cases List View** by selecting the hyperlink from Related List Quick Links. The list displays.
2. If associated cases exist, select the **Case ID** hyperlink for an associated case. The associated case detail screen opens.
3. Review the associated case information including case type, status, and assigned worker. This information may be relevant for court proceedings.
4. Access the **Court Orders/Hearings** related list on the associated case if needed. Review any prior court orders that may impact the current case.
5. Navigate back to the Treatment Case. The case detail screen displays.
6. Access the **Associated Intakes List View** from the Related List Quick Links. The intake associations display.
7. Click an associated intake record to review investigation findings. The intake detail screen opens.
8. Note how information from the intake, such as allegation details and substantiation findings, supports the dependency petition and court documentation for the case.
9. Navigate back to the Treatment Case. The complete view of the case with all associated records supports comprehensive legal preparation.

Lesson 2: Linking Court Orders to Permanency Plans

Permanency plans for the children require court ratification to ensure judicial approval of the case goals and planned services. Court orders documenting plan ratification must be linked to the permanency plan records in C-FIRST!. You will learn to associate court orders with permanency plans and understand the ratification workflow that connects legal proceedings to case planning for the children.

Lesson Objectives:

- Linking a Court Order to a Permanency Plan
- Documenting Ratification in Court Order Details

Task 1: Understand Permanency Plan Ratification Requirements

Permanency plans for children in DCS custody require court ratification. You will review how C-FIRST! tracks ratification status and the relationship between plans and court orders for the children.

1. Navigate to the Treatment Case by selecting the **Cases** tab.
2. Scroll to the **Related List Quick Links** section on the case record. The quick links display.
3. Select the **Plans** hyperlink. The **Plans List View** opens displaying any permanency plans for the case.
4. Review the list view columns including **Plan ID**, **Plan Type**, **Plan Status**, and **Plan Date**. Existing plans display if any have been created.
5. Note that permanency plans have multiple statuses indicating their progress through drafting, approval, and ratification. The plan status tracks whether the plan has been submitted to court and approved by the judge.
6. Understand that permanency plans requiring ratification cannot be moved to Complete status unless the Ratification Date field is populated. This ensures court approval is documented.
7. Note that options to populate the Ratification Date field include entering the actual date or selecting *None* if ratification is not required or was waived.

Task 2: Linking a Court Order to a Permanency Plan

When the court ratifies a permanency plan, the court order documenting that ratification must be linked to the plan record. You will associate a court order with a permanency plan for the children.

1. From the **Plans** Related List on the case, select an existing Custodial Permanency Plan record. The **Custodial Permanency Plan** detail screen opens.
2. On the **Custodial Permanency Plan** detail screen, locate the **Related Court Order** or **Ratification Court Order** field. This field links the plan to the court order that ratified it.
3. Enter the **Ratification Court Order** that documents the plan ratification. The court order links to the plan.
4. Enter the ratification date in the **Plan Ratification Date** field matching the date from the court order. The ratification is documented on the plan.
5. Review the **Plan Status** field. The plan can now be moved to appropriate status reflecting ratification.
6. Click **Save** to save the court order linkage and ratification date. The plan record updates.

Task 3: Documenting Ratification in Court Order Details

When a court order is linked to a Plan and the court order status is 'Completed', then 'Ratification Date' pre-populates to the Court Hearing Date and 'Plan Ratified?' pre-populates to Yes.

1. Navigate to the **Court Orders/Hearings** related list from the Treatment Case.
2. Select the court order record where the permanency plan was ratified. The **Court Order/Hearing Detail Screen** opens.
3. Verify that the **Hearing Type** field reflects a hearing type where plan ratification occurs such as *Permanency Hearing* or *Review Hearing*. Update if necessary.
4. Review that the **Plan Ratified** and **Ratification Date** field indicate the plan was ratified at this hearing.
5. Click **Save** to save the updated court order. The ratification documentation is saved.

Lesson 3: Legal Timelines

The **Legal Timeline** provides a visual representation of linked legal activities in chronological order. Users can review color-coded events and open associated records directly from the timeline.

The **Legal Timeline** on a case provides a single view of all petitions, court orders, and hearings, so you can see the full legal history without navigating into each individual record.

Learning Objectives

- Access the Legal Timeline screen from a Person record
- Identify linked legal events using color coding on the Legal Timeline
- Open a legal event record from the Legal Timeline

Task 1: Access the Legal Timeline

Users access the Legal Timeline to review the chronological history of legal events for the person/child.

1. Navigate to the desired Person record in C-FIRST! and click the Person Type record.
2. Click the **Timeline** tab. C-FIRST! displays the **Legal Timeline** screen.
3. Review the **Legal Timeline** screen. C-FIRST! displays a visual representation of linked legal activities in chronological order.



System Tip!

C-FIRST! populates the Legal Timeline from three record types: Court Orders/Hearings, Petitions/Motions, and Custody. All fields on this screen are auto populated and not editable by the user.

Task 2: Review Legal Events on the Legal Timeline

C-FIRST! has populated the Legal Timeline with Court Orders/Hearings, Petitions/Motions, and Custody records for a Case. Users will review the linked legal events and their color coding, then open a record from the timeline.

1. Locate the **Month** fields along the timeline. C-FIRST! populates these automatically to display the chronological sequence of legal events.
2. Locate the **Court Orders/Hearings** bubbles on the timeline. C-FIRST! populates these from Court Orders/Hearings records associated with the Case.
3. Locate the **Petitions/Motions** bubbles on the timeline. C-FIRST! populates these from Petitions/Motions records associated with the Case.
4. Review the color coding on the timeline. C-FIRST! displays linked **Court Orders/Hearings** and **Petitions/Motions** with the same color.
5. Locate any **Custody Start** bubbles on the timeline. C-FIRST! creates a *Custody Start* bubble when a Custody Start Date is populated and the Custody Status is *Active*.
6. Locate any **Custody End** bubbles on the timeline. C-FIRST! creates a *Custody End* bubble when a Custody End Date is populated and the Custody Status is *Inactive*.
7. Click an activity bubble on the timeline. C-FIRST! opens the corresponding record for that legal event.
8. Click the legal event bubble to navigate to the record and view details.

**Process Tip!**

C-FIRST! can automatically link certain legal events, such as Adoption Petitions and Adoption Court Orders/Hearings. Users can also manually link events, such as Petition to Petition, Petition to Court Order/Hearing, or Court Order/Hearing to Court Order/Hearing.

**System Tip!**

Matching colors indicate that legal events are linked to one another. Use the color coding to identify which Petitions/Motions are associated with which Court Orders/Hearings.

C-FIRST! generates *Custody Start* and *Custody End* bubbles from Custody records. These bubbles follow the same color logic as Court Orders/Hearings and Petitions/Motions.

Task 3: Compliance With Court-Ordered Deadlines

The following reviews are worklisted to comply with court-ordered deadlines. These are tasks triggered in the system to help meet timelines.

- An **Adoption and Safe Families Act (ASFA) Review** is worklisted when **all** the following conditions are met:
 - Today's date is **12 months after** the custody **Start Date**
 - The custody type is **DCS – Unruly** or **DCS – Social Services** (Department of Child Services, DCS);
 - **TPR action not documented:** For the Case Person, **either** there is:
 - No Case Conference with a **Compelling Reason** of “**TPR Has Been Filed**” (Termination of Parental Rights, TPR)
 - No **TPR Petition** record exists in “**Complete**” status
- A **Bi-Annual ASFA Review** is worklisted when all the following conditions are met:
 - Today's date is **6 months** after the most recent ASFA Review task; and
 - The linked Case Person has a Custody record in **Active** status; and
 - The custody type is **DCS – Unruly** or **DCS – Social Services**; and
 - TPR action is not documented: For the Case Person, **either** there is:
 - No Case Conference exists with a Compelling Reason of “TPR Has Been Filed,” or
 - No TPR Petition record exists for the linked Case Person
- A **409 Hearing – 17th Birthday** task is created when **all** the following conditions are met:

- The system date is **one month before** the child's **17th birthday**; and
- The Case Person has an **Active** custody record with a custody type that is **not Non-DCS Custody**

Knowledge Check!

Question 1: Which record types does C-FIRST! use to auto populate the Legal Timeline?

- A. Persons, Cases, and Contacts
- B. Court Orders/Hearings, Petitions/Motions, and Custody
- C. Safety Plans, Permanency Plans, and Services
- D. Intakes, Assessments, and Placements

Question 2: On the Legal Timeline, what does it mean when a Court Order/Hearing bubble and a Petition/Motion bubble display the same color?

- A. They occurred on the same calendar day
- B. They were created by the same worker
- C. They have the same hearing type
- D. They are linked to one another

Question 3: When creating an **Associated Case** linkage, which field do you use to search for and select the case to link?

- A. Originating Case
- B. Associated Case
- C. Assigned Worker
- D. Case Subtype

Question 4: On the **Custodial Permanency Plan** detail screen, which field is used to link the plan to the court order that ratified it?

- A. Plan Status
- B. Ratification Date
- C. Related Court Order (or Ratification Court Order)
- D. Hearing Type

Module 6: Documentation and Legal Status Management

Users will learn how to create court-ready case documentation, customize report formats for different proceedings, update custody information and track modifications, and maintain current legal status records for all case participants.

You create Case Documentation records on the Case Documentation related list, accessible from the Related List Quick Links on any case. Each record captures the documentation type, date of occurrence, method of contact, location, duration, and documentation notes. You select a Documentation Type when creating a new record, and C-FIRST! uses that selection to determine which additional fields are required and which validations the system enforces when you save.

Where do custody records and legal status records live?

Custody records and legal status records live on the **case person**, not on the case itself. You create a custody record by navigating to a case person and selecting **New** on the **Custody** related list. The **Custody Type** picklist includes values such as *DCS Full Guardianship*, *DCS Partial Guardianship*, *DCS-JJ*, *Non-DCS*, and *Voluntary Placement Agreement*. You create a legal status record from the **Legal Status** related list on the same case person, with values such as *Full DCS Guardianship*, *JJ Adjudication*, *Partial DCS Guardianship*, and *Unsubsidized SPG*.

After completing this module, you will be able to:

- Create case documentation records by selecting the correct documentation type
- Update custody information and track modifications

Lesson 1: Court-Ready Documentation

As the Assigned Attorney, you need to document your contacts with family members, record visits interactions between Case Persons, Collateral Persons, and DCS employees. This lesson teaches you how to create various types of case documentation records and associate the appropriate persons to each record.

Users create and manage Case Documentation records from both the Case record and the Person record.

Lesson Objective:

- Access Case Documentation from a Case Record and a Person Record
- Create a new Case documentation
- Create Court Ready Documentation

Task 1: Access the Case Documentation List View from a Case Record

1. Navigate to the desired Case record and locate the **Related List Quick Links** section on the Case record.
2. Click the **Case Documentation** hyperlink. C-FIRST! displays the **Case Documentation** list view.
3. Review the list view columns: **Documentation ID**, **Documentation Type**, **Documentation Status**, **Date of Occurrence**, **Method**, **Assigned Users**, **Created By**, **Provider Portal Source**, **Children**, and **Person Involved**.
4. Click a hyperlink in the **Documentation ID** column to open an existing record. C-FIRST! displays the **Case Documentation** detail screen.



System Tip!

The **Children** column on the list view displays the names of children associated to the record through the **Children** related list. Names display in a comma-separated format of First Name Last Name.

Task 2: Create a New Case Documentation Record

1. Navigate to the **Case Documentation** list view on the Case record.
2. Click **New**. C-FIRST! displays a record type selection.
3. Click **Next**. C-FIRST! displays the **New Case Documentation** pop-up.
4. Select *Child Contact* from the **Documentation Type** multi-select box. The other options in the Available multi-select box are:
 - Absconder Unit Investigation
 - Caregiver Contact
 - Child Contact
 - Child Visit with Other Family Member/Kin
 - Closing Summary
 - Electronic Monitoring Unit Summary
 - Foster Parent Contact
 - FSW Electronic Monitoring Alert Response
 - Law Enforcement Contact
 - Monthly Case Summary
 - Notation
 - Opening Case Summary
 - Other Family Member/Kin Contact
 - Parent-Child Contact
 - Parent-Child Visit
 - Parent Contact
 - Private Provider/DCS Contact
 - School Contact
 - Sibling Visit
 - Supporting Contact
 - Transport
5. Enter the date of the visit in the **Date of Occurrence** field.
6. Click the **Duration of Contact** dropdown. Select the applicable duration value.
7. Select the **Method** of documentation.
8. Select the **Location**.
9. Enter a description of the visit in the **Documentation Notes** field.
10. Click **Save**. C-FIRST! displays the **Case Documentation** detail screen for the newly created record.

**System Tip!**

C-FIRST! defaults the **Documentation Status** field to *Pending* when a new record is created. You do not need to set the status during initial creation.

**Process Tip!**

The **Method** and **Location** fields are required for all Documentation Types except *Monthly Case Summary*, *Notation*, *Electronic Monitoring Unit Summary*, *Closing Summary*, and *Opening Case Summary*. If you save without these fields populated for a contact or visit type, C-FIRST! displays a validation error.

Task 3: Add Collaterals Involved in the Case Documentation

1. Click the **Collaterals Involved** hyperlink in the **Related List Quick Links** section of the **Child and Family Team Meeting** screen. The **Collaterals Involved** screen displays.
2. Click **New** to create a new collateral record. The **New Collateral Involved** pop-up displays.
3. Click the **Collateral ID** and enter the required Collateral ID.
4. Click **Save** to save the record. The record is created.

**System Tip!**

- The **Collateral ID** field is a mandatory field. C-FIRST! displays an error if left blank and prevents users from proceeding.
- The other fields are populated once the record is saved.
- Users can add a new Collateral if they are unable to find them in C-FIRST!.

Task 4: Add Staff Involved in the Case Documentation

1. Click the **Staff Involved** hyperlink in the **Related List Quick Links** section of the **Child and Family Team Meeting** screen. The **Staff Involved** screen displays.
2. Click **New** to create a new collateral record. The **New Staff Involved** pop-up displays.
3. Click the **Staff Name** and enter the required staff name.

4. Click the **Agency** field and enter the name of the agency.
5. Click **Save** to save the record. The record is created.

**System Tip!**

The **Staff Name** field is a mandatory field. C-FIRST! displays an error if left blank and prevents users from proceeding. The other fields are populated once the record is saved.

**Process Tip!**

When updating the **Documentation Status** to *Completed*, at least one Collateral, Person Involved, or Children record is required. At least one person must also be added on the **Staff Involved** related list to complete the record.

Task 5: Access Case Documentation from a Person Record

1. Navigate to the **Persons** tab.
2. Click the desired Person record to open it.
3. Locate the **Related List Quick Links** section on the Person record.
4. Click the **Person Type** hyperlink from the **Related List Quick Links** section. C-FIRST! displays the **Person Type** related list.
5. Click an existing Client record. C-FIRST! displays the Person Type Person record.
6. Click the **Case Documentation** hyperlink from the **Related List Quick Links** section. C-FIRST! displays the **Case Documentation** list view.
7. Review the filtered list of Case Documentation records. C-FIRST! displays only records where the Person is a Person Involved or Child on the record.

**System Tip!**

C-FIRST! automatically filters the **Case Documentation** list view on a Person record to display only records where that Person is listed as a Person Involved or a Child. This filtering is automatic and cannot be changed by the user.

**Process Tip!**

Once the court documentation is ready, Case Manager and Legal Staff members can upload signed court orders for auditing purposes. Some of the forms they take to court are Permanency Plan, Independent Living Plan, Case Prints, Affidavits etc. Refer to the **Document Management** module to learn more about generating these forms for court proceedings.

Lesson 2: Custody Updates & Modifications

As the Case Manager or the Legal Staff member you need to add details of the legal and practical responsibility for the care and supervision of a child. With C-FIRST! You can capture episodes of state custody for a child so that custody is documented and tracked for a child.

Custody records can be accessed through the Case Person or the Court Order record.

In this lesson, you will also learn how to maintain a Legal Status. Legal Status helps users track changes to a child's legal status over time. A Legal Status with **no End Date** displays as **open/active** for that case person. **Adjudication and Legal Status are different concepts** (a legal status can exist without being an adjudication).

Lesson Objectives:

- Update & Track Custody Information
- Maintain Current Legal Status Records

Task 1: Update & Track Custody Information

1. Login as Legal Staff Member or Case Manager, click on the **Cases** tab and navigate to the desired Case record.
2. Click **Persons** hyperlink from the **Related List Quick Links** section. The Persons list view displays.
3. Click the **Case Person ID** from the list view. The **Case Person** list view displays.
4. Click **Custody** hyperlink from the **Related Lists Quick Links** section.

5. Click the **Custody ID** hyperlink to open an active custody record.
6. Click the **Pencil** icon in the **Custody Status** field.
7. Select **Custody Status** as *Inactive* or *Abridged*.
8. Enter the **End Date** for the custody.
9. Click the **Custody End Reason** dropdown and select a reason the for the end of custody. The options in the dropdown are:
 - Adoption
 - Death of child
 - Emancipation
 - Guardianship
 - Living with other relative(s)
 - Not Applicable
 - Reunified with parent, primary caretaker
 - Runaway
 - Transfer to another agency
10. Enter appropriate notes in the **Abridge Notes** field, if applicable.
11. Click **Save** to update the Custody details.

Task 2: Maintain Current Legal Status Records

1. Login to C-FIRST! as the Assigned Attorney and click the **Home** dropdown.
2. Select **Cases** tab.
3. Click the **Case ID** hyperlink. The Case record displays.
4. Click **Persons** hyperlink from the Related Lists Quick Links section. The Case Persons list view displays.
5. Click the case person hyperlink in the **Case Person ID** column. The case person screen displays.
6. Click **Legal Status** hyperlink from the Related Lists Quick Links Section. The **Legal Status** list view displays.
7. Click **New** to create a new legal status. The **New Legal Status** screen displays.
8. Click the **Legal Start Date** field and enter the start date.
9. The default option in the **Status** dropdown is Pending. The other options are:
 - Abridged
 - Active
 - Inactive

**System Tip!**

The **Abridge Reason** and **Abridge Notes** fields are displayed only when users select the *Abridged* option from the **Status** dropdown.

10. Click the **Legal Status** dropdown and select a legal status. The options in the dropdown are:
 - Full DCS Guardianship
 - Juvenile Justice Adjudication
 - Partial DCS Guardianship
 - Unsubsidized Permanent Guardianship

**System Tip!**

- For an *Active* Legal Status record, where the Legal Status type is **Full DCS Guardianship** with a TPR Associated Court Order and Hearing, the Guardianship can only be added after 30 days of the Date of Decision in the Court Order, to allow for the appeal period to pass.
 - It is mandatory to link at least one TPR Court Order in the Associated Court Orders/Hearings Related List before updating the Status to Active.
 - An Unsubsidized Permanent Guardianship cannot be added for a person in an active DCS Guardianship Legal Status.
11. Click the **Legal End Date** field and enter the end date.
 12. Click **Save**. Legal Status can be ended by changing the Status to *Inactive* and entering an **End Date**, showing the status held during that period. If **Full DCS Guardianship** is set to **Active**, at least one **TPR (Termination of Parental Rights) court order** must be linked first.

Knowledge Check!

Question 1: When setting **Full DCS Guardianship** to **Active**, what must be in place first?

- A. Custody Status set to Abridged with notes
- B. At least one TPR (Termination of Parental Rights) court order linked
- C. Legal End Date entered and Status set to Inactive
- D. Custody End Reason set to Reunified with parent

Question 2: Which fields are required for most contact/visit Case Documentation types (and will trigger a validation error if left blank)?

- A. Method and Location
- B. Documentation Status and Assigned Worker
- C. Duration of Contact and Documentation Notes
- D. Date of Occurrence and Documentation Status

Question 3: When updating a Case Documentation record's Documentation Status to Completed, what else is required?

- A. Only a Duration of Contact value
- B. At least one Staff Involved and at least one Collateral/Person Involved/Children record
- C. Only an Agency value on Staff Involved
- D. Only Method and Location populated

Module 7: Service Management

C-FIRST! has a robust and secure Service Management process that captures service delivery processes, case scheduling, resource allocation, service documentation, compliance with child welfare standards, and provides real-time analytics and reporting to ensure efficient and effective care for children and families. This module covers how to manage service referrals, and request funding authorizations.

After completing this module, you will be able to:

- Create Service Request
- Manage Service Logs
- Request Funding Authorizations

Lesson 1: Service Request

The Service Request record stores details of service referrals and requests for funding related to a Case, Person Client, or Provider. The services referred by using the Service Request functionality can be contracted or community resource services, such as Psychiatric Evaluation or Food Banks. In addition, funding for Assistance services, or those 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.

Lesson Objectives:

- Create a Service Request
- Add Provider Contacts
- Add Person Involved to the Service Request
- Create a Childcare Referral
- Add Children Details to the Childcare Referral

Task 1: Create a Service Request

A Service Request can be accessed on a Case, the Person Type or from related list on a Provider.

1. Login to C-FIRST! as the Assigned Attorney and navigate to the Treatment Case.
2. Click the **Service Requests** hyperlink from the Related List Quick Links section.

3. Click **New** to create a Service Request record.
4. Select the **Service Request** radio button and click **Next**.
5. Enter the **Service Taxonomy ID**. Users can also create a New Service Taxonomy record.
6. Click **Save**. The new Service Request record displays. The Service Category (Level 1 Service), Service Type (Level 2 Service), Service (Level 3 Service), and Request Type will be pre-filled based on the Service Taxonomy. The **Request Type** for **Emergency Services Service Category** is *Funding Request*. The other **Service Categories** are created as *Service Referrals*.

Note: Funding for Assistance services, or those 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 2: Add Provider Contacts

Provider Contacts captures the details of the providers that are contacted by the Placement Specialist for placement of the Child. This record also includes Provider acceptance details, and the final decision made by the Placement Specialist.

1. Click the **Provider Contacts** hyperlink from the **Related Lists Quick Links** section for the newly created **Service Request**. The Provider Contacts list view displays the list of Provider Contacts created for the Placement, including details such as Provider Contact ID, Provider Name, Date of Contact, Provider Response, Disposition Outcome, and Disposition Status.
2. Click **New** to add Provider Contacts. The **New Provider Contact** pop-up displays.
3. Click the **Date of Contact** field and enter **2/15/2026**.
4. Click the **Provider Name** field and enter provider name or select from the list of providers.
5. The **Level 1, 2, and 3** fields are calculated upon save.
6. The **Placement Request ID** field is auto populated but can be edited.
7. Click the **Other Provider?** dropdown and select **No**.
8. Click the **Provider Response** dropdown and select **Accept**. The options in the dropdown are:
 - Accept

- Deny
9. The default status of the **Disposition Status** dropdown is **Pending**. The options in the dropdown are:
 - Abridged
 - Completed
 - Pending
 - Worklisted
 10. Click the **Notes** field and enter the required comments.
 11. Click **Save** or **Save & New** to complete adding provider contacts.

Task 3: Add Person Involved to the Service Request

1. Click the **Provider Contacts** hyperlink from the **Related Lists Quick Links** section for the newly created **Service Request**.
2. Click **New Person Involved** button to add the person involved.
3. Select the **check box** next to the Person's name and click **Next**. The names of the person's are added.

Task 4: Create a Childcare Referral

1. Login to C-FIRST! as the Assigned Attorney and navigate to the Treatment Case.
2. Click the **Service Requests** hyperlink from the Related List Quick Links section.
3. Click **New** to create a Service Request record.
4. Select the **Childcare Referral** radio button and click **Next**.
5. Click the **Custodial or Non-Custodial Referral?** dropdown and select an appropriate option. For Non-Custodial Referral, enter **Caregiver's** name.
6. Click the **Referral Type** dropdown and select either Change, Initial, or Renewal.

Note: Based on the type of referral, some additional fields will be displayed on the screen. For Change Referral Type, select the **Change Type** from *Add Person, Provider or Termination*. For Initial and Renewal Change Type, add details in the **Timeframe Needed, Hours Needed** and **Enrollment Date** fields.

7. The default option in the **Status** field is *Pending*.
8. Enter the **Preferred Provider Name**.
9. Enter the **Preferred Provider Address**.

10. Enter the **Preferred Provider Phone Number**.
11. Enter any additional notes in the **Additional Details** field.
12. Click **Save**.

Task 5: Add Children to the Childcare Referral

1. Navigate to the recently created Childcare Referral record.
2. Click the **Children** hyperlink from the **Related List Quick Links** section.
3. Click **New** to add new child's details.
4. Enter details like **Case Person ID, Role, Type, Relationship** etc.
5. Click **Save** to add Children details to the Childcare Referral record.

Task 6: Submit Service Request for Approval

1. From the Homepage, navigate to the newly created **Service Request**. Alternatively, click the **Service Requests** hyperlink in the Related Lists Quick Links section of the case.
2. Click the **Service Request ID** hyperlink for the record that is ready for approval.
3. Review and verify if all the details are correct.
4. Click the **Submit for Approval** button in the top right corner of the screen. C-FIRST! displays the **Submit for Supervisor Approval** pop-up.
5. Enter any relevant notes in the **Comments** field.
6. Click **Submit**. C-FIRST! submits the record for approval and closes the pop-up.

Lesson 2: Service Log

The **Services Log** stores details of services provided to Case Persons and/or a Person Type in order to track services utilization. The **Service Log** can be accessed on the Case record, Person record, Provider Record and on the Service Request Related List.

Lesson Objectives:

- View a Service Log Summary
- Create a New service Log

Task 1: View Service Log Summary

1. Login to C-FIRST! as the **Assigned Attorney** and navigate to the **Cases** tab.
2. Click a **Treatment Case**.
3. Click the **Services Log** hyperlink from the Related Quick Links section.
4. Next, click the Persons tab and select a Person record.
5. Click **Person Type** hyperlink from the Quick Links Related List section.
6. Click the **Services Log** hyperlink from the Related Quick Links section.
7. Alternatively, navigate to the **Provider** tab, and select a Provider record.
8. Click the **Services Log** hyperlink from the Related Quick Links section.

Note: A New Service Log cannot be created from a Provider record, Person Type record, or directly from a Case record.

Task 2: Create a New Service Log

1. To create a new Service Log, navigate to the Treatment Case.
2. Click the **Service Requests** hyperlink from the Related List Quick Links section.
3. Click the Service Request ID to open the record.

Note: A service log cannot be created until the service request is approved.

4. Click **Service Log** hyperlink from the **Related List Quick Links** section.
5. Click **New** to create a new service log.

6. Click the **Service Location** dropdown and select the county.
7. The default option in the **Service Status** field is *Pending*.
8. Enter the **Service Start Date**.
9. Enter the **Service End Date**.
10. Enter the **Hours/Units Provided**.
Note: The total **Hours/Units Provided** for this Service Referral exceeds the Requested Units/Hours + any additional Units/Hours Requested.
11. Click the **Notes** field and enter appropriate comments about the service log.
12. Click the **Rejected Reason** field and enter appropriate reasons for rejection if the *Status is changed to Rejected*.
13. Click **Save**.

**System Tip!**

- The **Service End Date** cannot be after the **Anticipated End Date** or **Extended End Date** on the service request.
- User cannot create a new Service Log when Service Request record is *Completed/Rejected*.

Knowledge Check!

Question 1: Which condition must be met before you can create a new Service Log?

- A. The Service Request must be approved
- B. The Provider record must be opened first
- C. The Service Status must be set to Completed
- D. The Service Log must be created from the Case record

Question 2: From which location can you create a New Service Log?

- A. Provider record → Services Log related list
- B. Person Type record → Services Log related list
- C. Case record → Services Log related list
- D. Service Request record → Service Log related list

Question 3: After you enter the Service Taxonomy ID and save a new Service Request, which fields are pre-filled based on the taxonomy?

- A. Provider, Start Date, End Date, and Amount

- B. Service Category (Level 1), Service Type (Level 2), Service (Level 3), and Request Type
- C. Case Name, Person Role, and Documentation Status
- D. Method, Location, and Duration of Contact

Question 4: In the New Provider Contact pop-up, which set of fields is calculated upon save?

- A. Date of Contact and Provider Name
- B. Notes and Placement Request ID
- C. Level 1, Level 2, and Level 3
- D. Provider Response and Disposition Status

Question 5: When creating a Childcare Referral, which field's default value is Pending?

- A. Referral Type
- B. Custodial or Non-Custodial Referral?
- C. Change Type
- D. Status

Module 8: Document Management

C-FIRST! stores documents at two levels: Person or Case. The level a user selects determines where the document displays and who can access it.

Person-Level Documents

Attaching a document to the Person record keeps it with that individual across every case they appear in. Users should store documents at the Person level when the document belongs to the individual rather than to a specific case. Examples include birth certificates, identification documents, school records, and medical records.

Because Person-level documents live on the Person record, users must open that record separately to view them. The document does not need to be re-uploaded when the individual is included in a new case.

Case-Level Documents

Documents tied to a case or to a related object (Assessment, Court Order, Plan, Petition, or Placement) appear on the case's Attachments tab. Every worker assigned to the case can view them in one location. These documents do not follow an individual into future cases.

This module provides knowledge on how to access case documentation, upload, and how to print information available in the system, including the seven different categories for download and print.

After completing this module, you will be able to:

- Manage Case Documentation
- Create a Case Print for court hearings
- Understand the seven different categories for download and print

Lesson 1: Access Documentation

C-FIRST! provides document management tools that allow you to upload, search, download, and maintain attachments on Case records. In this lesson, you will practice the workflows for managing documents on the Attachments tab.

Learning Objectives

- Navigate to the Case Documentation list view from a Person record
- Create a Case Print for Court proceedings

Task 1: Access the Attachments Tab on a Case Record

1. Navigate to the Case record. C-FIRST! displays the Case record with its associated tabs.
2. Click the **Attachments** tab. C-FIRST! displays the list of all attachments associated with the Case record like ICAMA, ICPC, ICJ, Legal Documents, Affidavits etc.
3. Review the columns displayed for each attachment in the list: **File Name**, **Category**, **Sub-Category**, **Document Date**, **Graphic Content**, and **Status**.



System Tip!

- The attachments list on a Case record includes all attachments associated with the Case ID, any Person ID on the Case, and any Assessment, Court Order, Appeal, Plan, Child and Family Team Meeting, Petition, or Placement associated with the Case.
- C-FIRST! sorts the attachments list by created date, beginning with the most recent documents. Attachments with a Status of *Inactive* are hidden by default.

Note: Refer to the Court Order Creation and Management module for details on the Attachment tab.

Task 2: Access the Attachments Tab on a Court Order Record

1. Navigate to the Case record. C-FIRST! displays the Case record with its associated tabs.
2. Click **Court Orders and Hearings** hyperlink from the Related Lists Quick Links section.

3. Scroll down to the bottom of the Court Order record and click the Attachments tab below the Related Lists Quick Links section. C-FIRST! displays the list of all attachments associated with the Court Order record like Court Orders, Court Orders related to Eligibility etc.
4. Review the columns displayed for each attachment in the list: **File Name, Category, Sub-Category, Document Date, Graphic Content,** and **Status.**

Task 3: Access Case Documentation from a Person Record

1. Navigate to the **Persons** tab.
2. Scroll down to the bottom of the screen to locate the **Related Files** section. The Attachments tab displays the list of all attachments associated with the person like Education, Health Verifications etc.
3. Click on the hyperlink in the **File Name** column. The document opens in a preview format.



System Tip!

C-FIRST! automatically filters the **Case Documentation** list view on a Person record to display only records where that Person is listed as a Person Involved or a Child. This filtering is automatic and cannot be changed by the user.

Task 4: Generate Case Print

1. Navigate to the Treatment Case from the **Cases** tab.
2. Click the **Case Print** hyperlink from the **Related List Quick Links** to print Case Information and related records like Child and Family Team Meetings (CFTMs), Plans, and legal activities, navigate to the desired Case and List View displays details such as Case Print ID, Date and Time, Type, Create User, Requestor, and Request Reason.
3. Click **New** to create a new case print request. The **New Case Print: Case Print** pop-up displays.
4. Click the **Start Date** field and enter the date the Case Print will start pulling information.
5. Click the **Request Reason** field and the reason for Case print.
6. Enter the **Requestor** name for the Case print.
7. Click **Save.**

8. The Case Print record is created. In the **Entity Selection** section, the related records on the case are displayed in Level 1; Level 2 displays the child records on the related records, and so on.
9. Click the checkboxes for the related records that need to be printed.
10. Click the **Generate Print** link and all selected related records are compiled into a PDF that opens in a separate screen.
11. **Double-click** a specific field to redact any sensitive information that needs to be hidden or should not be printed.
12. Click the **Print** hyperlink in the right-side top corner. The **Print** pop-up displays.
13. Click **More Settings** dropdown to select the **Background Graphics** checkbox.
14. Click **Save** to print the document with the redacted information. After a Case Print is created, the **Selected Entities** view will be displayed in a read only mode. The related records that are selected for print will be displayed as *selected* and the ones that are not selected will be displayed as *not selected*.

Lesson 2: Generate a Form

C-FIRST! includes a variety of forms that users may need to generate, complete, and distribute as part of their casework. Before learning the specific steps for each, it's important to understand that **not all forms work the same way**. The workflow you follow will depend on the type of form you're working with.

The process is comprised of three main components:

- **Trigger:** This refers to a specific event or condition that requires a user from the C-FIRST! to generate a form. This includes events such as case initiation, court proceedings, case reviews, interagency communication, updates to stakeholders etc. The trigger can be manually initiated (C-FIRST! user going to the forms screen, selecting a form, providing the necessary inputs and then clicking the preview button) or automatically triggered.

- **Form Generation and Review:** This refers to navigating to the the Central Forms Search screen, selecting the type of form to be generated, and providing necessary inputs. C-FIRST! pre-populates the required details and generates the form accurately for consistency in documentation. The user reviews and edits it before proceeding to next steps.
- **Next Steps:** Next steps include sharing the form with necessary stakeholders via email or other communication channels. Some forms require signatures after which, these signed documents are required to be stored in C-FIRST! for record-keeping. Finally, notifications are sent to stakeholders only when their e-signature is requested or when all e-signatures on the form have been completed.

At a high level, C-FIRST! forms fall into several categories:

- **System-Generated PDF Forms:** These are forms that C-FIRST! generates automatically using data already in the system. When you print or download these forms, they come out as PDFs. They are not editable after generation. These are useful when you need a finalized, read-only document -- for example, a summary or report that pulls directly from case data.
- **Modifiable Word Forms:** Some forms generate as Word documents that you can edit before finalizing. This is important when a form requires narrative input, additional details, or customization that goes beyond what the system auto populates. After editing, the user typically saves the final version and uploads it back to the case record.
- **E-Signature Forms:** Certain forms support an electronic signature workflow, allowing users to email the form to external parties (such as parents, providers, or attorneys) for review and signature. This eliminates the need to print, physically sign, scan, and re-upload the document.
- **OCR Forms:** Some forms may arrive as scanned documents that go through Optical Character Recognition (OCR) processing, converting the scanned content into searchable, readable text within the system.
- **Manual Print-to-PDF:** In some situations, a user may need to manually print a screen or document to PDF using their

browser or system print functionality, rather than relying on a system-generated output.

- The steps you take to generate, edit, and distribute a form will vary based on which category it falls into. As we walk through each workflow in the lessons ahead, we'll identify which form type applies so you always know which path to follow.

C-FIRST! provides a centralized form generation feature that allows users to select, populate, preview, and generate forms from system data. During this lesson, you will practice the manual form generation process using a Form Generation Type 3 form (System Prefilled PDF, Editable Preview), from selecting a form through downloading the completed document.



System Tip!

The Save As field determines the download file format. Select the format based on whether the form is configured for PDF or DOCX output.

The Signature, Sequence, Signer, and Signer Email fields are conditionally visible only when the form requires signatures. Either the Signer field or the Signer Email field must be populated for each signature line. Sequence values cannot be duplicated across signers.

Lesson Objectives:

- Understand the Form Categories
- Generate Forms Automatically
- Add e-signatures
- Generate forms manually

Task 1: Automatic Form Generation Process

On completion of the form's trigger condition, a bell notification is triggered for relevant parties who have been defined to receive the notification.

1. Log into C-FIRST! and from the homepage click the bell (Notification) icon. The notification tray displays the notifications from the last 30 days.
2. Click the notification to navigate to the form.
3. Alternatively, navigate to the desired Person or Assessment or Case record.
4. Scroll to the bottom of the screen to click the **Attachments** tab.
5. The Attachments tab displays the list of all attachments associated with the relevant record.
6. Click on the hyperlink in the **File Name** column. The document opens in a preview format.

Note: Previews will only be available for forms that are generated in PDF format and when the document status is *Signature Pending*.

7. Click **Save**. The file is downloaded to the user's local machine in the specified file format.

Task 2: E-sign a Form

On generating the form, the system will automatically generate and send an email to the signer.

1. Open the email and click the **link** in the email. The user will be navigated to the Guest Portal Login screen.



System Tip!

All signers (with or without an account with C-FIRST!) will be directed to the Guest Portal Login screen using the URL provided in the automated email and will log in as a guest user to view the documents that have been signed.

2. Click the **Enter Email** field and enter the email address.
3. Click the next **arrow**. An OTP will be sent to the guest's email inbox.
4. Click the Enter Secret Key field and enter the OTP received in the email.
5. Click the next **arrow**. The form displays.
6. Click the **E-Sign** button. The document sign screen displays.
7. Click the **Choose the File to Sign** dropdown and select the form to be signed.

8. Click the **Choose Signature Field** dropdown and select **Sign Here**.
9. Click the **Sign in the Box Below** field and select either **Draw** or **Type** button.
10. Proceed to type or sign your signature.
11. Click the **Are you sure** checkbox.
12. Click **Sign** to save your signature. Once all required signatures are completed, all stakeholders will receive an automated email update that all signatures have been completed.

Task 3: Manual Form Generation Process

1. Login to C-FIRST! as the Assigned Attorney and from the homepage click the **Home** dropdown and select **Central Form Search**. The Central Form Search tab displays information about the form, such as the Name, Category, and Sub-Category.
2. Click the **Download** button if the form is to be downloaded as an empty template.
3. From the **Forms Templates** listed, select the radio button in the **Select** column to select a form.
4. The **Input** list view displays where the users can select the relevant data to populate on the form.
5. Use the **Search** button to search for a case or person. After performing a search, users can select a record.
6. Click **Preview** to view the document in the preview screen.
7. Close the preview and navigate back to the Forms Template screen. If additional related inputs are required, the relevant data displays in a list or grid format, enabling users to easily choose from the available options. Based on the form selected the following selection options are available:
 - Person Therapy
 - Case and Assessment
 - Person and Plan
 - Child and Parent
 - Interstate Compact Request
 - Background Check
 - Person and Eligibility Type etc.
8. Click **Save**.

9. The **Delivery Options** screen displays the file format of the form to be downloaded.
10. Next add the **Signers** who will be required to sign the document.
11. Click **Generate** and a confirmation message with a link to view the generated document will be visible in the **Attachments** tab, where it can be downloaded.

Knowledge Check!

Question 1: How do you navigate to the Central Form Search screen in C-FIRST!?

- A. Select Generate Form from the Quick Actions menu
- B. Click the New Form button on the Case record
- C. Click the Forms tab on the navigation bar
- D. Click the Home dropdown and select Central Form Search

Question 2: Which columns are displayed for each form in the list on the Central Form Search screen in C-FIRST!?

- A. Name, Category, and Sub-Category
- B. Name, Form Number, and Date Created
- C. Name, Description, and Form ID
- D. Name, Type, and Status

Question 3: What does C-FIRST! display after you click Generate on the Delivery Options screen?

- A. The Input screen to verify all entries before download
- B. A confirmation message with a link to view the generated document
- C. The document preview pop-up with the final version
- D. The Central Form Search screen with the form highlighted

Question 4: During form generation in C-FIRST!, previews are available only for forms generated in which file format?

- A. HTML
- B. CSV
- C. PDF
- D. DOCX

Question 5: Which fields in C-FIRST! are conditionally visible only when a form requires signatures?

- A. Signature, Sequence, Signer, and Signer Email
- B. Approver Name, Approval Date, and Approval Status
- C. Document Type, Document Status, and Generated By
- D. Form Category, Form Sub-Category, and Form Owner

Question 6: 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

Glossary

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

Term	Definition
Associated Cases	A related list on a case record that displays other C-FIRST! cases linked to the same family or persons involved.
Case Person Detail	Screen name for viewing person information within a Case context rather than Person Detail screen.
Case Summary	Tab on Case Record providing AI-generated high-level overview of Case status, assessments, placements, interactions, and court orders.
C-FIRST!	This refers to Tennessee's new Child Welfare platform built on Salesforce. C-FIRST! stands for Child and Family Information Records System Tracking.
CFTM	This refers to the Child and Family Team Meetings, which are collaborative meetings aimed at supporting the welfare and well-being of children and families involved.
CSEM	This refers to Commercially Sexually Exploited Minor victim.
Decisions Tab	This refers to the tab containing Investigation Disposition checklists, content varies by Case subtype.
D/N	This refers to a court order and stands for Dependency and Neglect; in some cases, this may also refer to petition types.
FCCR	This refers to the Field Customer Care Representative who is responsible for setting up employees in the C-FIRST!.

Term	Definition
Homepage	This refers to the main landing page in C-FIRST! that displays widgets and other workload management tools.
ICJ	This refers to Interstate Compact for Juveniles is the only legal means to transfer a juvenile's supervision from one state to another.
ICWA	This refers to the Indian Child Welfare Act. This is a federal law that establishes standards for the removal and placement of Native American children, including placement preferences and notification requirements. C-FIRST! captures ICWA applicability and court determinations.
JJ	This refers to a court order and stands Juvenile Justice.
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.
Person ID (PID) Number	Unique identifier automatically assigned to each person record in C-FIRST!.
QRTP	This refers to the Qualified Residential Treatment Program.
Related List	Sections on a record showing associated information such as addresses, relationships, case assignments, and service history.
Services Request	A form used to record information received via phone calls, email, and non-phone calls for information collection only. These are not assigned to a user or region and cannot be cloned.

Term	Definition
Treatment Case	The Treatment Case is a family case which can include a combination of Custodial, Non-Custodial, and Juvenile Justice activities. Reference the script for any additional details.
TPR	Termination of Parental Rights (Petition or Court Order) to terminate the legal rights of a parent or parents over their Child.
Utility Bar	A toolbar at the top of the C-FIRST! interface with quick access to help resources, user information etc.