



C-FIRST! Training

Network Development Learner Guide

Tennessee Department of Children's Services



Network Development Course Learner Agenda

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Introduction

Welcome to State of Tennessee Department of Children's Services (DCS) C-FIRST! **Network Development Course**. We are excited to have you here with us! As you may have learned through receiving Change Champion materials, monthly communications, and completing the **C-FIRST! For All** web-based training, we are moving to an integrated and modernized case management platform. C-FIRST! provides comprehensive and streamlined ways to manage Intake, Investigations, Safety Decisions, Case and Person Data, Placement, Provider, and Eligibility Information.

This course provides practical end-to-end learning for Network Development workers in C-FIRST! including Placement Processing and Placement Updates. Before we dive into the details of the course, we are going to recap some general navigation terms and discuss what to expect during training today.

Let's Dive In

Before completing placement-related work in C-FIRST!, you need a strong understanding of how to access the system, navigate key areas, manage documents, and work within the permissions assigned to your role. In this module, you will build the foundational skills needed to use C-FIRST! effectively and prepare for the role-specific workflows covered in later modules. These core skills help ensure records are accessed appropriately, documentation is handled correctly, and work moves through the system as intended.

Where do I start in the system?

You will begin on your **Homepage**, where you can quickly access the **Home** menu to navigate to the most commonly used areas in C-FIRST!, such as Placements, and Documents. List Views will help you work efficiently by switching between items you recently viewed, items assigned to you, or broader views when permitted.

How do I upload and manage required documents?

C-FIRST! uses **Document Upload** to store and associate required documents to the correct record. You will learn how to upload files using the correct document type/category and attach documents to the right Placement context.

What to Expect

Throughout this guide, you will be tasked with:

- Accessing the system, navigating key menus, and using core tools efficiently.
- Uploading, attaching, and managing required documents using **Document Upload**.
- Managing placement search, creating/reviewing placement agreements, and validating placement history.
- Understanding payment processing at a high level.

Your Role

You are a C-FIRST! user whose responsibilities depend on your assigned role. In this training, you will learn the foundational navigation and document management skills needed to work in the system, along with the placement-related tasks relevant to your role. You will also see how role-based permissions affect what you can view, update, submit, or approve throughout the placement process.

Course Objectives

By the end of this training, you will be able to navigate key system features and complete core daily tasks in the system. You will be able to manage documents using Document Upload, complete core Placement Specialist tasks related to placement intake and processing and perform key placement update activities such as reviewing change notifications, creating secondary placements, and initiating additional placement actions. You will also understand, at a high level, how placement-related records connect to downstream payment processing activities.

Icons Used Throughout the Course

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

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

Module 1: General Navigation

This module introduces the foundational skills needed to work in C-FIRST! effectively. You will practice logging in to the system, reviewing **Homepage** components, navigating key areas using the global menu, and understanding how assigned roles affect what you can view and do. The module also covers switching between list views, accessing task notifications, moving from a task to its related record, and managing documents through basic upload and download activities.

Today's Tasks: This widget displays tasks assigned to the logged-in user and shows when each task is due. Users can switch between views such as **Today's Tasks**, **All Overdue**, **Completed Within Last 7 Days**, and **Delegated Tasks**, depending on their access and available task filters. The **View All** button allows users to view all the tasks with due dates equal to today.

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, Persons or to log a call or 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.

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

- Log in to C-FIRST! and identify **Homepage** components and user role permissions
- Navigate between tabs using the global menu
- Access, filter, and manage task notifications across different task views

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

Before beginning placement-related work in C-FIRST!, you must successfully log in, navigate the system, and understand how your assigned role determines your access and responsibilities. Roles in C-FIRST! control what information you can view, what actions you can take, and when work must be routed for review or approval. This module provides the foundational system knowledge needed before moving into the role-specific responsibilities covered in later modules.

Learning Objectives

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

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

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. Click the **Password** field, enter *your secure password*.
4. Click **Log In**. C-FIRST! validates your credentials and displays the **Home** tab.
5. Verify that you have arrived at the **Homepage**.

Task 2: Review the Homepage Components

Now that you are logged in, familiarize yourself with the Homepage layout. The **Homepage** displays critical information about your work.

1. Locate the **Greetings** component at the top of the **Homepage**. C-FIRST! displays your name.

2. Locate the **Previous Login Details** component below the **Greetings** component. C-FIRST! displays the date and timestamp of your last login session.



Process Tip!

Your specific role determines what actions you can perform in C-FIRST!. Understanding these permissions helps you know when you can complete tasks independently and when you must submit work for supervisory approval.

Note: Today's Tasks on the **Homepage** displays items assigned to you that are due today. The tasks shown are based on your assigned role and help you identify work requiring action.

Lesson 2: Navigating the Homepage

Navigation in C-FIRST! allows you to quickly access the records.

Learning Objectives

- Navigate between tabs using the global menu
- Switch between different list views

Task 1: Navigate Using the Global Menu and Homepage

The global menu in C-FIRST! provides access to all major system functions. You will use this menu to navigate to the **Placements** tab where you can locate any Placements. Your **Homepage** displays several components that provide direct access to your assigned tasks. To locate any Placements in C-FIRST!, follow the steps below:

1. Locate the navigation bar at the top of the C-FIRST! screen. The navigation bar displays tabs for major system functions.
2. Click the **Home** tab in the navigation bar. C-FIRST! displays your **Homepage**.
3. Navigate to the **Placements** tab from the **Home** dropdown. The **Recently Viewed** screen displays.
Note: You can find any Placement and click the **Placement ID** hyperlink to view the details of that record. The **Details** screen of the selected Placement record is displayed.
4. Click the **Home** tab to return to your **Homepage**. C-FIRST! displays the **Homepage**.

Task 2: Understand User Role Permissions

Your specific role determines what actions you can perform in C-FIRST!. Understanding these permissions helps you know when you can complete tasks independently and when you must submit work for supervisory approval. Log into the C-FIRST! platform using the username and password provided by the team and click **Login**. The **Homepage** displays.

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. Review the **Today's Tasks section** that displays the following widgets:
 - **View All Link**: This link allows users to view all the tasks.
 - **Today**: This list view displays tasks that are due today.
 - **My Tasks**: This list view displays tasks that are assigned to the user.
 - **All Overdue**: This list view lists tasks that have not been completed by their due date.
 - **Completed Within Last 7 Days**: This list view displays recently completed tasks, those that were completed in the past 7 days.
 - **Previous Login Information**: This section displays the date and time of the user's previous login.
4. Review the **Items to Approve** section that displays the **Related To**, **Type**, **Most Recent Approver**, and **Date Submitted** fields.
5. Select the **My Tasks** option from the dropdown. C-FIRST! displays Tasks with a Flag and the Due Date that are assigned to you.
6. Click **View All** to view the **Recently Viewed Tasks** list view. The fields displayed are **Subject**, **Name**, **Related To**, and **Due Date**.
7. Click the **Subject** hyperlink or the **Related To** hyperlink to navigate to the **Task Details** screen.

Lesson 3: Document Management

In this lesson, you will learn about the robust and secure Document Management functionality within **C-FIRST!** solution. It supports the uploading, management, and downloading of documents so that we

have the information necessary to support our staff and children in our care.

Learning Objectives

- Overview of Document Management
- Upload or download documents

Task 1: Document Management Overview

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

1. Navigate to the **Placement** tab from the Home dropdown and click on the **Placement ID** hyperlink to access the record.
2. Click the **Attachments** tab. This displays the list of all files or documents associated with the corresponding record.
3. Click the desired **File Name** hyperlink to open the file and view.



System Tip!

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

Task 2: Upload and Download Documents

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

1. Click the **Attachments** tab of the Provider record as above.
2. Click **Basic File Upload** to upload a document, the **Upload File** pop-up displays. **Note:** Basic Upload functionality supports single document uploads.
3. Click **Document Date** field to enter the date.
4. Click **Document Category** dropdown and select from the list of options.
5. Click **Document Sub-Category** and select from the available options.
6. Click **Upload Files** button and select the appropriate file from your computer to upload. **Note:** You can also click the **Drop File** button to drag and drop a file for upload.

7. Click the **Document Name** textbox to enter a filename if relevant.
8. Click **Save** to proceed, after the file is uploaded the **Related Files** list displays.
9. Click the **Download** button to download a file. Once the file download is complete, you will receive a notification.
10. Click **Advance File Upload** button to upload, combine and split documents. The ImageTrust screen displays.
11. Click **Upload All Documents** to proceed. **Note:** All files created via ImageTrust will be PDFs.



System Tip!

You can browse files to upload or drag and drop files. Once you have selected the necessary documents, they will display them down on the left-hand side of the ImageTrust screen. ImageTrust provides users with a wide variety of functions to split, combine, duplicate, or delete individual documents and pages from those documents. Once you have finished editing, splitting, and merging the chosen documents, you can then choose each individual document and complete the necessary document information. File names are assigned by the system using the same convention as when uploading multiple files.



Process Tip!

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

Knowledge Check!

Question 1: Where can you view the tasks assigned to you that are due today?

- A. Provider Portal
- B. Today's Tasks
- C. Global Menu
- D. Placement Search History

Question 2: From which tab do you locate the Placement Recently Viewed screen?

- A. Home
- B. Cases
- C. Placement
- D. Persons

Module 2: Person Management

This module covers the end-to-end process of managing Person Records in C-FIRST!. It begins with searching for existing Person Records before creating new ones, a critical step that prevents duplicate records in the system. Users will practice searching by name and date of birth, handling scenarios where no results are returned, and searching with limited information. When a search confirms no existing record, the module walks through creating a new Person Record, generating a Person ID (PID), and establishing the appropriate Person Type.

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

- Search for existing Person Records and interpret search results to prevent duplicates
- Create new Person Records, generate a Person ID (PID), and establish a Person Type

Lesson 1: Searching for Existing Person Records

Before adding any individuals, you must first search C-FIRST! to determine if a Person Record already exists. This prevents duplicate records and ensures you can access any prior Case History.

Learning Objectives

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

Task 1: Access Person Search

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

4. Click the **Search** button. C-FIRST! opens the **Person Search** screen.

**System Tip!**

The **Person Search** screen allows you to search across all Person Records in C-FIRST!, not just those associated with your current Case. We found over 200,000 duplicate persons in TFACTS that we have tried to remediate. We do not want to create the same situation in C-FIRST! This is why the system will force you to search for a name/person before you can create a new person record. Always perform a thorough search before creating a new Person Record.

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

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

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

**Process Tip!**

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

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

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

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

Task 3: Search for a Child Using Limited Information

1. Click the **Clear** button to reset all search fields.
2. Click the **First Name** field and enter *first name*.
3. Click the **Last Name** field and enter *last name####*.
4. Click the **Date of Birth** field and enter *date of birth*.
5. Click the **Search** button.
6. If multiple results appear, compare the **Date of Birth** and any available **Address** information to identify the correct person.
7. Click the **Select** button next to the correct Person Record to associate them with the Case. C-FIRST! adds the person as a Case Person.

Task 4: Perform a Search That Returns No Results

During your Investigation of the Carter family, you learned that James Wilson recently moved in. James has no prior DCS history in Tennessee. You will search for James to confirm no existing record exists before creating a new one.

1. Click the **Clear** button to reset all search fields. C-FIRST! clears the previous search criteria.
2. Click the **Last Name** field and enter *last name####*.
3. Click the **First Name** field and enter *first name*.
4. Click the **Date of Birth** field and enter *date of birth*.
5. Click the **Search** button. C-FIRST! displays the message, "Exhaustive search has found no evidence of any matches in the database."

Note: When no matches are found, you must create a new Person Record. Any record that has a duplicate record that still needs to be approved must be submitted to a supervisor for approval.

Lesson 2: Creating New Person Records

When a person search confirms no existing record, you must create a new Person Record in C-FIRST!.

Learning Objectives

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

Task 1: Initiate New Person Record Creation

1. From the **Person Search** screen where no results were found, click the **New Person** button. C-FIRST! opens the **New Person** record screen.
2. Click the **First Name** field and enter *first name*.
3. Click the **Last Name** field and enter *last name####*.
4. Click the **Date of Birth** field and enter *date of birth*.
5. Click the **Gender at Birth** dropdown and select *gender*.
6. Click the **Race** dropdown and select *race*. Options include:
 - Abandoned
 - American Indian or Alaska Native
 - Asian
 - Black or African American
 - Declined
 - Native Hawaiian or Other Pacific Islander
 - White
 - Unknown
7. Click the **Ethnicity** dropdown and select *ethnicity*. Options include:
 - Hispanic or Latino
 - Not Hispanic or Latino
 - Unable to Determine

8. Complete any additional required fields displayed on the screen.
9. Click **Save**. C-FIRST! saves the new Person Record and displays the **Person Details** screen.



System Tip!

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



Process Tip!

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

Non- Emergency Person Records: You may encounter instances where there is a duplicate person record but the person record needs to be established in the system. In a non-emergency situation, this person record is routed to the Office of **Data Governance and Analytics (ODGA)** queue for review. The ODGA will do research and provide a response within 3 business days.

Emergency Person Records: You may encounter instances where there is a duplicate person record and the person needs to be established in the system "day of". In this emergency situation, the person is routed to the Directors Queue to review and approve.

Note: Please refer to policy and your supervisor's guidance to determine which person records are considered emergency and non-emergency approvals; please use best practice to include person records during the initial phases of cases management.

Task 2: Generate a Person ID (PID)

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

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



System Tip!

C-FIRST! checks against the Social Security Administration Database if you select Yes for the "SSA Validation Required?" field.

Verified SSNs support accurate identity matching across the system. If a user wants to run a person's SSN against the SSN database, they should answer *Yes* to the SSN validation question. A daily batch will run to verify the reported SSNs and users will see either *Verified* or *Unsuccessful* when they check the following day.

Knowledge Check!

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

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

Module 3: Placement Processing

This module provides an overview of the end-to-end placement cycle, from creating an initial Placement Request to updating placement outcomes, managing Secondary Placements and Placement Changes, and initiating a Trial Home Visit. The module is organized into three lessons, each anchored in a case scenario and aligned to tasks that reflect real-world processing steps and approval requirements.

Note: Provider setup is referenced in this module at a high level as part of the placement workflow. Detailed instruction on provider setup is covered in the Provider Initiation and Management training.

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

- Complete a Placement Request that is assigned to you and submit for approval
- Complete a Placement Search and initiate a Request
- Manage Secondary Placements and submit for approval
- Initiate creating a Trial Home Visit

Note: Before you begin, navigate to your Case and then click on Case Person hyperlink. Click on the Case Person ID and click on the Custody hyperlink from the Related List Quick links section. Click New, select Active from the Custody Status dropdown and enter a Start Date. Next in the Removal section, select the Caregiver Name from the search field. Enter the Reason for Custody from the Available section. Select from the dropdown menu for the Family Structure field. Select a value for the Environment at Removal dropdown.

Note: We need to associate one other person to the Case. From the Case, click Persons from the Related List Quick Link section. Click on Search New Persons button and search for a person to associate with the Case.

Note: The Case Manager must create a new Placement Action request by clicking on the Placement Actions hyperlink from the Related List Quick Link section of the case. They will complete the required fields, selecting the child, select Foster Care as the Requested Placement Type, entering Date and time and the Reason for Placement field.

Lesson 1: Placement Workflow

Case Scenario: Kim Bond

A Case Manager submits a placement request for Kim Bond. The request is assigned, completed, and approved through the placement intake process. A Placement Specialist then searches for providers, sends placement requests, reviews provider responses, and selects a provider for Kim Bond, creating a Primary Placement.

Learning Objectives:

- Complete a Placement Request, recommend Home Based
- Submit for supervisor approval

Task 1: Placement Intake Assignment of the Request

In this task, the supervisor assigns the Placement Request to the Placement Intake worker so the worker can connect with the case manager for *Kim Bond* and gather any additional details needed.

1. Log in as a **Placement Intake Supervisor**. The **Homepage** displays.
2. Navigate to the **Placement Actions** tab.
3. Click the dropdown arrow next to Recently Viewed view and select the **Pending Placement Request Intakes** from the dropdown list.
4. Click the checkbox on the desired **Placement Request** record to assign to the user.
5. Click **Assign User** button on the far-right corner of the screen to assign the request. The **Assign User** pop-up displays.
6. Click the **Assignee** field and enter the *name of the assignee*.
7. Click **Save**. The user assignment is completed successfully.

Task 2: Complete Placement Intake and Submit for Approval

In this task, the Placement Intake worker reviews the Placement Request for *Kim Bond*, connects with the Case Manager to gather any needed details, and completes the youth information on the Placement Request screen.

1. Log in as a **Placement Intake Worker**, the **Homepage** displays.
2. Click the **Notifications** icon in the far-right corner of the screen. The **Notifications** pop up displays.

3. Click the notification **Placement Intake Supervisor assigned you a task**. The **Task** screen displays.
4. Click the **Related To** hyperlink from the **Task** section. The **Placement Request Details** screen displays.
5. Click the **Placement Actions** hyperlink from the **Related List Quick Links** section. The **Placement Actions** list displays.
6. Click the **Placement Request** hyperlink. The **Placement Request** detail screen displays.
7. Navigate to the **Referral Intake Information** section and click on the following field:
 - Click **Intake Status** dropdown and select *Intake Complete* from the dropdown options.
 - Enter the **Start Date**.
 - Click the **Child's Current Living Situation** dropdown and select from the options.
 - Click the **Probable Goal** dropdown and select from the options.
 - Click **Child Disabilities/Medical Status** dropdown and select from the options.
 - Click **Placement Needed For** dropdown and select from the options.
 - Enter **Number of Children Being Placed** field.
 - Click **Inappropriate Sexual Behavior (ISB)?** dropdown and select from the options.
8. Click **Child's Strengths** field and enter information.
9. Click **Child's Interest** field and enter information.
10. Click **Diagnosis** and enter information.
11. Click **Impressions and Findings** and enter information.
12. Scroll down to **Worker Information** section, click **Summary of Findings** and enter information.
13. Navigate to the **Intake Approval Details** section, click **Recommended Placement Type** and select from the dropdown and click the **Approver** field, enter *Placement Intake Supervisor*.
14. Click **Save**.
15. Click **Submit for Approval**, to submit the placement request for approval.

Task 3: Placement Request

In this task, the Placement Intake Supervisor reviews the Placement Request for *Kim Bond* and approves the record. After approval, the Placement Request is available for a Placement Supervisor to assign to a Placement Specialist. The Placement Supervisor uses the **Placement Actions** tab to assign the request to the Placement Specialist so the placement process can continue.

Note: The Placement Intake Supervisor will also have the option to return the Placement Request for additional information during the approval process.

1. Log in as a **Placement Specialist Supervisor**. The **Homepage** displays.
2. Click the **Notifications** icon in the far-right corner of the screen. The **Notifications** pop up displays. **Note:** To locate the **Placement Request**, you can sort the **Start Date Needed** column or **Earliest Available Date/Time** column.
3. Click the **Placement Request** checkbox and click the **Assign User** button on the far-right corner.
4. Enter **Placement Specialist** user for the **Assignee** field and click **Save** and log out.
5. Log in as a **Placement Specialist** and click the **Notifications** icon and open the task that the Placement Specialist Supervisor assigned you.
6. Click the **Related To** hyperlink. The **Placement Action** screen displays.
7. Review all the sections on the **Placement Action** screen.
Note: There are three sections on the **Placement Action** screen: **Placement Request** section, **Person Details** section, and **Provider Match** section.

Note: After approving the Placement Request, the Placement Intake Supervisor will assign the request to the Placement Specialist by clicking on **Assign User** and entering *Placement Intake Supervisor* for the **Assignee** field.

Task 4: Conduct Provider Search and Send Request

The Placement Specialist reviews the **Placement Request** screen and uses the **Provider Match** screen to identify available providers. The

Placement Specialist then selects **Providers** to generate a **Placement Referral**. **Note:** Provider refers to all Placement types including DCS or private placements. Provider setup is not covered in detail in this guide. See Provider Initiation and Management training for full instruction.

1. Log in as a **Placement Specialist**. The **Homepage** screen displays.
2. Navigate to the **Placement Actions** tab from the home dropdown. The **Placement Actions Recently Viewed** screen displays.
Note: The list view displays **Placement Actions** created for the record, including details such as **Record ID, Record Type, Person Name, Intake Worker, Placement Specialist, Intake Status, Earliest Available Date/Time, Request Status, Start Date Needed**, and **Recommended Placement Type**.
3. Click the **Record ID** hyperlink of *Kim Bond's* **Person Name** to view the record details. The **Placement Action** screen displays.
4. Review the following tabs in the **Placement Request** section:
 - **Placement Request Information** – This tab captures the core details about the placement request, including the child's basic demographics, placement type requested, timing needs, key contacts, and educational/eligibility indicators.
 - **Recommendations** – This tab captures the assessment-driven recommendations that help determine the appropriate placement/service intensity, including risk-related calculations and any alternate intensity recommendation with rationale.
 - **Referral Intake Information** – This tab captures the referral and custody context required to make a placement decision. It includes intake progress, key background factors such as the child's current living situation and permanency goal.
 - **Strengths and Interests** – This tab captures the child's strengths and interests to support matching and individualized planning.

- **Emotional Report** – This tab captures the behavioural health information such as **Diagnosis** and **Impressions and Findings**.
 - **Charge Information** – This tab captures the legal/justice involvement that may affect the placement options.
 - **Preferred Provider Demographics** – This tab captures the preferences or requirements for the Provider. It includes desired household characteristics, environmental preferences, and other setting constraints as well as other demographic related preferences.
 - **Areas of Consideration** – This tab captures the key domains the team should review for placement fit. It prompts the staff to consider what supports or services may be necessary in each area.
 - **Worker Information** – This tab captures a quick summary of findings that helps a placement worker to understand the record without reading the full record.
 - **Intake Approval Details** – This tab captures the details of the Intake approval.
 - **Placement Coordinator** – This tab captures the workflow status and outcome for the request. It also records the date on which the coordination is finalized.
5. Click the **Provider Match** tab and enter information for any known fields. **Note:** The results provided on the **Provider Match** screen are based on the information and preferences associated with each Provider. The list view displays all Providers found based on the search criteria.
 6. Click the **Provider Name** field and enter the *Provider's name*. Select the option from the dropdown list.
Note: As the user begins typing the name field, C-FIRST! auto-completes the functionality to display a list of matching names of Providers.
 7. Click **Search**. The **Provider Match** search list view display.
 8. Click the checkbox to select one or multiple Providers.
Note: To review the details of the Provider, click the dropdown icon in the right corner and select View. The **Provider detail** screen displays.

9. Click the **Send Request** button. This allows the user to send **Placement Requests** to the selected Providers.
Note: Once a request is sent, the Placement Provider logs into the Provider Portal, views the task to review the request and provides response as Accepted – Child Meets Contract Scope - Can be Placed Immediately.
10. Navigate to **Provider Contacts** related list from the **Quick Links** section.
11. Click **Provider Contact ID** and check the field **Provider Response** as Accepted – Child Meets Contract Scope - Can be Placed Immediately.
Note: Only one provider can be selected for the child. Once a Provider is selected, if there are remaining Provider Contacts the worker will dispose of each Contact.
12. Click the **Provider Contacts** hyperlink in the Related List Quick Links section to finalize the selection.
13. Select the appropriate provider, and in the **Provider Decision** section set **Disposition Outcome** field to *Placed with Provider* and **Disposition Status** to *Completed*.
14. Click **Service ID** field, search and associate a service. Click on **Save** button.
Note: The Provider receives a task in the Portal to confirm the Placement Referral. A Primary Placement is systematically created. To verify that, navigate back to the **Treatment Case** for *Kim Bond* and click on **Case Related Activities** hyperlink in the **Related List Quick Links** section. Confirm that a task is work listed for the **Primary Placement** with **Subject** = "[First Name] [Last Name] - Placement Needed."

Knowledge Check!

Question1: What must a Placement Intake Worker do to submit a Placement request for approval after completing the updates?

- A. Click Assign User and select the supervisor
- B. Enter the Supervisor information in the Approver field and click the submit for approval button
- C. Click Approve on the Placement Action Screen

D. Click Notification icon to proceed further

Question 2: Which tab captures the core placement details like demographics and requested placement type?

- A. Recommendations
- B. Placement Request Information
- C. Referral Intake Information
- D. Approval History

Module 4: Placement Updates

During an active placement, additional placement types may be required. Throughout this module, you will learn about Secondary Placements, ending Placements, and conducting Trial Home visits. You will also see the handoffs between you and your supervisor to assign these tasks, complete them, and finally approve them.

After completing this module, you will be able to:

- Finalize Placement start and complete required Placement details
- Update Placement Status and Create Secondary Placements
- Create a Trial Home Visit

Lesson 1: Placement Changes

Case Scenario: Kim Bond (Continued)

After Kim Bond's placement is secured, the Placement Invoicing Worker updates the placement details and completes the placement start process, changing the placement status to Admitted.

When Kim is hospitalized for 10 days, the provider notifies the Case Manager, who submits a Placement Change Notification for Network Development. The Placement Invoicing Worker reviews the notification, creates and manages a secondary placement as needed, and ends the secondary placement when Kim returns. The worker may also initiate a Trial Home Visit when directed.

Learning Objectives:

- Review Placement and Update
- Create a Placement Change Notification record
- Create, submit, approve and end a Secondary Placement

Task 1: Review Placement Details

1. Log in as a **Placement Invoicing Supervisor** to review the Placement. The **Homepage** screen displays.
2. Click the **Placement** tab from the home dropdown to assign the record to the **Placement Invoicing Worker**. The **Placements** list view displays.
3. Search for the desired **Placement ID** of the *Primary Placement* and review the details. **Note:** After reviewing, the Primary

Placement Record is then assigned to the Placement Invoicing Worker.

4. Click the checkbox for **Primary Placement** record.
5. Click **Assign User** on the far-right corner of the screen to assign the placement record. The **Assign User** pop-up displays.
6. Click the **Assignee** field and enter the *name of the assignee*.
Note: The Assignee is auto-assigned by C-FIRST! in some cases.
7. Click **Save**. The user assignment is completed successfully.

Task 2: Update Placement Status

The Placement Invoicing Worker then enters the placement details and updates the placement status to complete. Once completed, the Placement Status is automatically updated to Admitted.

1. Log in as a **Placement Invoicing Worker**. The **Homepage** screen displays.
2. Click the **Notifications** icon in the far-right corner of the screen. The **Notifications** pop up displays.
3. Click the notification received for **Placement Invoicing Supervisor assigned you a task**. The **Task** screen displays.
4. Click **Related To** hyperlink. The **Placement** screen displays.
5. Click the **Placement Start Status** dropdown in the **Child Information** section of the **Placement Details** and select *Completed*.
6. Enter the **Placement Start Date**.
7. Click **Is This Placement with Kin/Relatives?** dropdown and select from the options.
8. Click **Payment Rate Type 1** dropdown and select from the options.
9. Click **Save**. **Note:** Verify that the **Placement Status** is updated to *Admitted*. The updates are saved successfully.

Task 3: Create and Review Placement Change Notification

1. Navigate back to the **Case** details. Click **Placement Actions** from the **Related List Quick Links** section. **Note:** The case manager can perform this action of creating the placement change notification.
2. Click **New**, the **New Placement Action** pop-up displays.

3. Select **Placement Change Notification** radio button and click Next.
4. Click **Requested Reason** field and select from the options.
5. Enter the **Date** and **Time** fields.
6. Click the **Request Details** field and enter the reason for the placement change and click **Save** and log out from the system.
7. Log in as a **Placement Invoicing Supervisor** to review and assign the Placement Change Notification. The **Homepage** displays.
8. Navigate to the **Placement Actions** tab and select the **Pending Placement Change Notification** filter.
9. Click the checkbox on the **Placement Change Notification** Record to assign to the user.
10. Click **Assign User** button on the far-right corner of the screen to assign the request. The **Assign User** pop-up displays.
11. Click the **Assignee** field and enter *name of the assignee*. **Note:** This should be assigned to Placement Invoicing Worker.
12. Click **Save**. The user assignment is completed successfully.

Task 4: Create Secondary Placement and Submit Placement for Approval

The Placement Invoicing Worker then creates a **Secondary Placement** record for a hospitalization, enters required details such as the **Placement Start Date** and **Days Committed to Pay**, and submits the record to the **Placement Invoicing Supervisor** for approval.

Note: Secondary Placements cannot be added unless the Primary Placement is in Admitted status.

1. Log in as a **Placement Invoicing Worker**. The **Homepage** screen displays. **Note:** The task should be displayed in the **Notifications** or you can navigate to the **Tasks** tab from the Home dropdown and click on the **Related To** hyperlink for the placement change task.
2. Review the fields in the **Placement Change Notification** tab in the **Change Information** section.
3. Click on the **Case ID** hyperlink from the **Navigation** links section below to create the secondary placement record.
4. Click **Placements** from the **Related List Quick Links** section.

5. Select the **Placement ID** of the placement where the **Placement Status** field is admitted.
6. Click the **Secondary Placement** hyperlink from the **Related List Quick Links** section. The **Secondary Placement** list view displays.
7. Click **New**. The **New Placement: Secondary Placement** screen displays.
8. Click the **Secondary Placement Type** dropdown and select *Hospitalization*. The options in the dropdown are:
 - Detention
 - Hospitalization
 - Respite
 - Runaway

Note: When the **Secondary Placement Type** is *Hospitalization*, then either **Last Name/Organization Name** field or the **Other Provider Name** field must be completed.

9. Click the **Days Committed to Pay** field and enter the *number of days*.
10. Click the **Pay Commitment Status** dropdown and select the *status*. The options in the dropdown are:
 - Abridged
 - Completed
 - Pending
11. Click the **Placement Start Date** field and enter the *date*.
12. Click the **Placement Start Status** and select *pending* from the options.
13. Click the **Approver** field and enter the *name of the approver*.
Note: Select Placement Invoicing Supervisor for the Approver.
14. Click **Save**. The Placement is created successfully.
15. Click **Submit for Approval** to submit the Placement Record for Approval. The **Submit for Approval** pop-up displays.
16. Click the **Comments** field and enter the *comments*.
17. Click **Submit**. The placement is submitted for approval successfully.

Task 5: Approve Secondary Placement

The Placement Invoicing Supervisor then reviews the Hospitalization record, approves, and updates the Days Committed to Pay Status and the Placement Start Status to complete.

1. Log in as a **Placement Invoicing Supervisor**. The **Homepage** screen displays.
2. Click the **Notifications** icon in the far-right corner of the screen. The **Notifications** pop up displays.
3. Click the notification received for **Placement Invoicing Worker is requesting approval for placement**. The **Approval Request** screen displays.
4. Click **Approve** button on the top right corner of the page. The **Approve Placement** pop-up displays.
5. Click **Comments** field and enter the *comments*.
6. Click **Approve**. The placement is approved successfully.
7. Click the **Placement ID** hyperlink from the **Approval Details** section. The **Placement** screen displays.
8. Review the **Placement** details.
9. Scroll down to the Placement Information section and click the **Placement Start Status** dropdown and select *Completed*.
10. Click **Save**. **Note:** This updates the **Placement Status** field to *Admitted*.
Note: The child has been hospitalized and Placement has started.

Task 6: End Secondary Placement

The Placement Invoicing Worker completes the hospitalization secondary placement by updating the Start Status to Completed, and after 10 days enters the Placement End Date and updates the Placement End Status to Completed. This can be done both by a Placement Invoicing Worker or a Placement Invoicing Supervisor.

1. Log in as a **Placement Invoicing Worker/supervisor**. The **Homepage** screen displays.
2. Navigate to the **Placements** tab from the **Home** dropdown.
3. Click the **Placement ID** hyperlink for *Kim Bond* of the **Secondary Placement** record type. The **Placement** screen displays.
4. Scroll down to the Placement Information section and click the **Placement End Date** field to enter the required end date.
5. Click the **Placement End Status** dropdown and select *Completed*.

Note: Set the end date after 10 days of the Start Date.

6. Click **Save**. **Note:** Scroll up the page to verify that the **Placement Status** is systematically updated to **Discharged**.

Lesson 2: Additional Placement Actions

This lesson introduces additional placement actions that may take place after placement. You will complete the process to initiate a Trial Home Visit as part of continued placement management.

Learning Objectives:

- Initiate Trial Home Visit

Task 1: Initiate Trial Home Visit

The Placement Invoicing Worker or Supervisor has ended the existing Primary Placement. In this scenario the child has exited the hospital and court has ordered a Trial Home Visit. **Note:** In C-FIRST!, Case Managers will utilize the Placement Change Notification to alert Network Development of the end of a placement and start of a Trial Home Visit.

1. Log in as a **Placement Invoicing Worker**. The **Homepage** screen displays. **Note:** This can also be done by a Placement Invoicing Supervisor.
2. Navigate to the **Cases** tab from the home dropdown. The **Cases Recently Viewed** screen displays.
3. Search the **Treatment Case** for *Kim Bond* on Global Search. The search results display.
4. Click the **Case ID** for *Kim Bond* the **Case** screen displays.
5. Click the **Placements** hyperlink from the **Related List Quick Links** section. The **Placements** list view displays.
6. Click **New**, the **New Placement** page displays two options *Primary Placement* and *Trial Home Visit*.
7. Select the radio button **Trial Home Visit** and click **Next**. The **New Placement: Trial Home Visit** pop-up displays. **Note:** The youth will temporarily return home under close supervision, so we need to create a Trial Home Visit Placement to document the visit.
8. Click the **Case Person ID** and enter *Kim Bond* case.
9. Click **Placement Start Date** to enter the *date*.

10. Click **Save**. A new Trial Home Visit placement record has been created successfully.

Note: To end the Trial Home Visit, you can click on the Placement Start Status to Completed and save the record.

Knowledge Check!

Question 1: What must the Placement Invoicing Supervisor do to assign a pending Placement Change Notification to a user?

- A. Open the Placement History screen and select the assignee
- B. Click the notification icon and approve the request
- C. Select the desired Placement Request record, click Assign User to enter the assignee name, and click Save
- D. Navigate to Payment Processing History and update the record

Question 2: Where does a Placement Invoicing Worker go to open the assigned task from a supervisor?

- A. Notifications
- B. Record ID
- C. Details tab
- D. Reports

Question 3: When creating a Secondary Placement with type Hospitalization, what additional requirement applies?

- A. Placement End Date must be entered before saving
- B. End Reason must be selected
- C. Either Last Name/Organization Name or Other Provider Name must be completed
- D. Placement Start Status must be Completed

Glossary

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

Term	Definition
CCWIS	This refers to Comprehensive Child Welfare Information System.
C-FIRST!	Child and Family Information Records System Tracking refers to Tennessee's new Child Welfare platform built on Salesforce.
DCS	This refers to the Department of Children's Services (Tennessee).
Field	A part of an object that holds a specific piece of information, such as text or a number.
List View	A list display of items (for example accounts or contacts) based on a specific criterion.
Navigation Links	This is a section on all related lists and other main screens (Provider, Case, Intake). The links allow you to navigate to associated records such as the parent record.
Related List	A section of a record or other detail page that lists items related to that record.
Related List Quick Links	This is a section on top of any record that displays a list of links that leads to List Views of records related to the original record.