



C-FIRST! Training

Provider Initiation and Management
Learner Guide

Tennessee Department of Children's Services



Provider Initiation and Management Course

Learner Agenda

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Introduction

Welcome to State of Tennessee Department of Children's Services (DCS) C-FIRST! **Provider Initiation and Management 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.

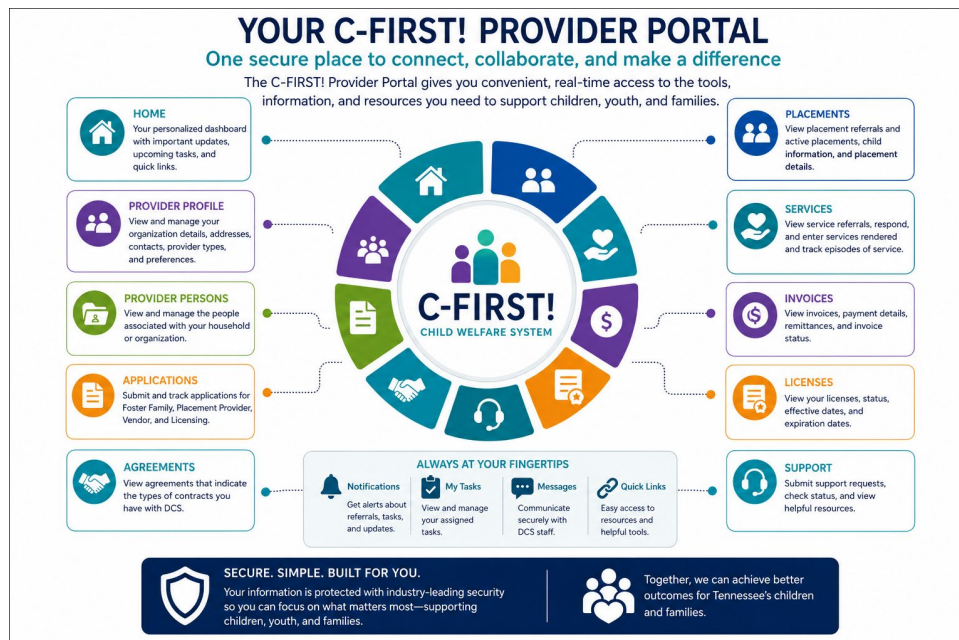
This course provides practical end-to-end learning related to Provider Initiation and Management including Provider Inquiry, Document Management, Placement Provider Applications, Vendor Applications, Setting Up Providers, Processing Agreements, and Supervisory Functions.

Let's Dive In

Understanding how C-FIRST! supports Provider Initiation and Management is essential to helping DCS staff deliver timely, high-quality services for children and families. In C-FIRST!, a Provider is a person, family, or organization that delivers care or services, including Placement, Licensed and Vendor Providers. Providers are also contract foster homes and DCS foster homes. While external prospective Providers only use the Provider Portal to request access and submit applications, DCS staff use C-FIRST! to review applications, create or update Provider records, manage required information, support approval and ongoing maintenance.

In this course, you will learn how to navigate C-FIRST!, work with Provider information, review applications and attachments, and use key tools such as Related Lists, Quick Links, and supervisor functions to manage Provider workflows efficiently.

By the end of this course, you will understand how C-FIRST! supports Provider setup, review, approval, and management across DCS Provider workflows.



What to Expect

Throughout this guide, you will be tasked with:

- Accessing C-FIRST!, navigating key menus/screens, and using core tools efficiently.
- Requesting access to the Provider Portal, setting up and activating a user account, and navigating the portal.
- Submitting a Provider Application through the Provider Portal.
- Completing the end-to-end Placement Provider process in C-FIRST! (application completion, Provider search, Provider/person/type setup, attachments, evaluations, and disposition review/approval).
- Completing the end-to-end processes for Vendor/DPA Providers and Licensed Providers.
- Navigating Associated Related Lists to review linked records (cases, agreements, corrective action plans, court orders, intakes, and placements).
- Applying supervisor functions, including approving applications, managing workload distribution, conducting quality assurance, and reassigning records.

Your Role

You are responsible for Provider Initiation and Management activities in C-FIRST!, including reviewing and progressing Provider submissions, creating and maintaining Provider records, and managing agreements and related information across Provider Types. The course also introduces the supervisor role and provides practice with oversight steps that keep work moving approvals, workload distribution, quality checks, and reassignment.

Course Objectives

After completing this course, you will be able to:

- Navigate key areas of the C-FIRST! Homepage
- Explain the purpose and workflow of the Provider Portal, including account setup, and application submission.
- Complete end-to-end processing for Placement Providers, including application completion, Provider search, record creation (Provider, Provider person, Provider type), attachments, evaluations, and disposition.
- Complete end-to-end processing for Vendor/DPA Providers and Licensed Providers.
- Create and manage Provider Agreements and Services, and update Provider information as needed.
- Use Associated Related Lists to review linked records and activity (Cases, Agreements, Corrective Action Plans, Intakes, and Placements).
- Perform key supervisor functions, including approvals, workload management, quality assurance, and record reassignment.

Icons Used Throughout the Course

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

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

Module 1: General Navigation

The module covers C-FIRST!'s search functionality for locating Cases and Person Records, switching between list views, and managing the alerts and notifications that drive daily workflow. Users will practice the following task management functions:

- Accessing task notifications
- Switching between task views, including **All Tasks, Opening Tasks, Overdue Tasks, and Today's Tasks**
- Navigating from a task to its related Case Record
- Marking tasks as complete

The module concludes with personalizing the user experience by pinning default list views and adjusting list view settings.

After completing this module, you will be able to:

- Log in to C-FIRST!, identify Homepage components, and understand user role permissions
- Navigate between tabs, Cases, and records using the global menu and **Related List Quick Links**
- Access, filter, and manage task notifications across different task views
- Navigate from a task notification to its related Provider Record
- Mark tasks as complete and review approval notifications
- Pin default list views and customize Homepage preferences

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

Before beginning work, learners must successfully log in and understand how their assigned provider role determines what they can see and do in C-FIRST!.

Learning Objectives

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

Task 1: Log In to C-FIRST!

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. In the **Username** field, enter your DCS *username*.
3. In the **Password** field, enter your *secure password*. The characters display as dots for security.
4. Click **Log In**. C-FIRST! validates your credentials and loads the **Homepage**. The Homepage displays your personalized dashboard with role-based widgets.

Task 2: Review the Homepage Components

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

- **Today's Tasks:** This widget displays a list of all the tasks that are assigned to the worker and when it is due. The subject and the associated record ID are displayed. The arrow in the top right corner of the User Tasks widget displays Today's, My Tasks, All Overdue, Completed within Last 7 days and Delegated Tasks views. The **View All** button allows users to view all the tasks 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. Task 3: Understand User Role Permissions

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

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

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

Lesson 2: Navigating the Homepage and Global Menu

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

Learning Objectives

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

Task 1: Navigate Using the Global Menu

The global menu in C-FIRST! provides access to all major system functions.

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 desired tab in the navigation bar. C-FIRST! navigates to the appropriate **List View**.
4. Click the **Home** tab to return to your **Homepage**. C-FIRST! displays the **Homepage**.

**System Tip!**

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

Task 2: Access Provider records from Homepage Components

Your **Homepage** displays several components that provide direct access to your assigned tasks. To locate the provider, follow the steps below:

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

**System Tip!**

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

Task 3: Use Related List Quick Links

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

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

**System Tip!**

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

Task 4: Pin Default List Views

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

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

4. Click the **Home** tab in the navigation bar. C-FIRST! displays the view you pinned by default.

Task 5: Use List View Settings

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

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



System Tip!

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

Lesson 3: Understanding Notifications

C-FIRST! uses tasks and notifications to alert you when action is required on a record. Based on your role, you will receive notifications when tasks are assigned, when approvals are needed, and when deadlines approach. Understanding how to manage these notifications confirms you meet required timeframes.

Learning Objectives:

- Access task notifications
- Navigate from a task to its related record
- Mark tasks as complete
- Review approval notifications

Task 1: Access Your Task Notifications

1. Click the **Home** tab in the navigation bar. C-FIRST! displays your **Homepage**.
2. Locate the **Today's Tasks** component on your **Homepage**. C-FIRST! displays tasks with due dates matching today's date and status of *Worklisted* or *Pending*.
3. Click the **View All** hyperlink below the **Today's Tasks** component. C-FIRST! navigates to the **Tasks List View**.
4. Review the **Today's Tasks List View** which displays columns for the following:
 - Subject
 - Name
 - Related To
 - Due Date
 - Status
 - Priority
 - Last Modified Date/Time
 - Last Modified By Alias
 - Assigned To
 - Completed Date/Time
5. Locate the task that has been assigned to you.



System Tip!

The **Today's Tasks** component only shows tasks due today. Use the **View All** link to see all your assigned tasks regardless of due date.

Task 2: Mark Tasks as Complete

After completing the required action for a task, you must update the task status to reflect completion. This removes the task from your open items and provides an audit trail of completed work.

1. On the **Task Details** screen, locate the **Status** field. C-FIRST! displays the current task status (e.g., *Pending* or *In Progress*).
2. If the task status is *In Progress*, locate the **Mark Complete** button at the top of the task record.
3. Click the **Mark Complete** button. C-FIRST! updates the task status to *Completed*. **Note:** Observe that the **Mark Complete** button is replaced by a **Completed** button. This button allows you to change the status back to *Pending* if needed.

**System Tip!**

If you need to modify task details before completion, click the **Edit** button. C-FIRST! opens the task in edit mode.

Task 3: Review Approval Notifications

When you submit records or agreements for approval, your supervisor receives a notification. After they review, approve, or reject your submission, you will receive a notification of the decision.

1. Click the **Home** tab in the navigation bar. C-FIRST! displays your **Homepage**.
2. Check your notifications for approval-related tasks.
3. If you see an approval notification, click the task to view details. C-FIRST! displays the task information.
4. Click the **Related To** hyperlink to navigate to the record requiring action. C-FIRST! opens the related finding or assessment. **Note:** Review any comments from your supervisor explaining why the record was returned. Make necessary corrections before resubmitting.

Lesson 4: Document Management Fundamentals

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

Learning Objectives

- Overview of Document Management
- Upload or download documents

Task 1: Document Management Overview

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

1. Navigate to the **Provider** tab from the Home drop-down. The **Provider Recently Viewed** screen displays.
2. Click the desired hyperlink on the Provider **Account Name** to navigate to the record. The **Provider** screen displays.
3. Click the **Attachments** tab. This displays the list of all files or documents associated with the corresponding record.

4. Click the desired **File Name** hyperlink to open the file and view.

**System Tip!**

Upon clicking the hyperlink, the **Attachment** record will open. From this screen, you can view and edit the attachment details, as applicable. Any edits made will be saved upon clicking **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** drop-down and select from the options:
 - HART Assessment
 - Home Study Assessments and Approvals
 - Incident Report
 - Monitoring and Evaluation
 - Notifications/Notices
 - PREA
 - Performance Improvement Plan and Documentation
 - Provider Application
 - Provider Correspondence
 - Training
 - Other
5. Click **Document Sub-Category** and select from the available options.
6. Click **Upload Files** and select the appropriate file from your computer to upload. **Note:** You can also click the **Drop File** 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 **Download** to download a file. Once the file download is complete, you will receive a notification.
10. Click **Advance File Upload** 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 be displayed down 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: What occurs when a File Name hyperlink is selected in the Attachments tab?

- A. The File is deleted
- B. The Attachment record opens for viewing
- C. The File downloads automatically
- D. The Provider record closes

Question 2: What does the push pin icon do in a list view?

- A. Pins a preferred view as the default
- B. Locks the column widths for all users
- C. Exports the list to PDF
- D. Opens the record in split view

Question 3: Which upload option supports combining and splitting documents and opens ImageTrust?

- A. Basic File Upload
- B. Upload Files button
- C. Drop File
- D. Advance File Upload

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: Navigating Persons

Before we dive into person management, we wanted to do a quick recap on understanding the terms you will see throughout this module and where to locate them within C-FIRST!.

Learning Objectives

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

Task 1: Persons

Established Intake Persons that have been added to the Investigation Case automatically or a manually added New Person who has been validated by the worker.

Note: If a person is mentioned at Intake and established then their information will carry over from Intake into the Case Person related list. If they were not established at Intake, they will not be carried over into the Investigation and would need to be added to the Investigation as a New Person once more information was gathered.

1. Log in to C-FIRST! using your credentials. C-FIRST! displays the Homepage.
2. Select *Person* from the **Home** dropdown. The **Recently Viewed Person** screen displays.
3. Click **New** to search for, and possibly add, a new person.
4. Enter any known details on the **Search for a Person** screen. The search results display and show a list of potential matches, if any. **Note:** The more information you add, the more the system has to compare against other individuals in the system.
5. Click **New Person** to create a new Person Record if no individuals were found to match your search, you had a score less than 85%, or you received supervisor approval.
6. Complete the required fields on the **New Person** screen for *Date Of Birth Unknown?*, *Last Name*, *Gender at Birth*, *Ethnicity*, and *Race*.
7. Click **Save**.



System Tip!

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

Task 2: Provider Person Record

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

1. Navigate back to your **Homepage**.
2. Open the **Notifications** list and locate the task that has been assigned to you.
3. Click the **Related To** hyperlink in the **Task** section of the notification. C-FIRST! redirects you to the **Provider Request** screen.
4. In the Information section, click the **Provider** hyperlink to view the **Provider** account details.

- Click the **Provider Persons** from the **Related List Quick Links** and click the **Provider Person ID** hyperlink to view the Provider Person record.



Process Tip!

- In C-FIRST!, you must establish a person and create a person record before you can link that person to a case to become a case member. Person records are linked to different cases when they are added as a case member to a specific case.

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

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

PERSON RECORD (PID)

Person Record (PID)

Single persistent record — the PID never changes no matter how many intakes, cases, or provider records.

Jane Doe's PID 12345 stays 12345 across all records, forever.

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

Person Record

Lesson 2: 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 **Case 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 3: 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: Introduction to Provider Portal

This module provides a formal, end-to-end overview of the Provider Portal from both the DCS staff and provider perspectives. Users will examine how prospective providers use the portal to begin the application process, starting with enrollment and account activation and continuing through the completion and submission of a Provider Application. In addition, the module is designed to help DCS staff understand the provider experience so they can effectively support, guide, and respond to providers throughout the process. By presenting both perspectives, the module builds a comprehensive understanding of the portal workflow, user responsibilities, and key steps in the application journey.

Provider Portal link: [Click Here](#)

After completing this module, you will be able to:

- Request access and activate your Provider Portal account
- Submit a Provider Application through the Portal

Lesson 1: Portal Enrollment and Account Setup

This lesson provides an overview of the initial steps required to access the Provider Portal, with a focus on portal enrollment and account setup. Providers will learn how to register, create login credentials, and activate their account to access the portal. DCS staff will gain insight into the provider's initial portal experience to better support these steps.

Learning Objectives

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

Task 1: Requesting Access to the Provider Portal

1. Click the **Register** button, on the main screen of the Provider Portal. The registration screen displays.

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

Task 2: Setting up and Activating a User Account

1. Search for the email with the subject as **Your TN DCS Provider Portal Registration Request is Approved** in your registered email inbox. **Note:** This happens only after their Inquiry on C-FIRST! side is completed and they are authorized.
2. Click on the email. The email screen displays.
3. Review the details on the email and click the **account creation screen** hyperlink. The **Set-up Security Question** screen displays.
4. Click the **Question** drop-down, select the appropriate question. The options in the drop-down are:
 - What is your mother's maiden name?
 - What was the name of your first pet?
 - What was the name of your elementary school?
 - In what city were you born?
 - What is your father's middle name?
 - What is the name of your favorite childhood friend?
 - What was your childhood nickname?
 - What street did you grow up on?
 - What is the name of your favorite teacher?
 - What was the name of your first employer?
 - What was your favorite place to visit as a child?
 - What is the name of your first school?

5. Click the **Answer** field, enter the *answer*.
6. Click **Continue**. The **Set up Your Account Password** screen displays.
7. Click **Create Password** field, enter a new *password*.
8. Click **Confirm Password** field, enter the *password* again.
9. Click **Create Account**. The account has been created successfully.
10. The **Welcome to Tennessee's Department of Children's Services Provider Portal** screen displays.
11. Click the **Username** field, enter the registered *email address*.
12. Click the **Password** field, enter the *password* and click **Log in**.
13. The **Welcome XXXX** screen displays.

Lesson 2: Provider Application

This lesson provides an overview of the Provider Application process, with a focus on how a potential provider completes and submits an application through the Provider Portal. From the provider perspective, participants will learn the steps required to enter application information and submit it for review. From the DCS staff perspective, this lesson builds understanding of the provider submission process and prepares staff to complete a Provider Application when one is received in another format.

Learning Objectives

- Submit Provider application through the Provider portal

Task 1: Submitting Provider Application through the Portal

1. Log in to the Provider Portal with your *username* and *password*.
2. Click the **My Applications** tab from the Homepage. The **My Applications** screen displays.
3. Review the following in the My Applications screen:
 - **Application Number**
 - **Application Type**
 - **Provider Type**
 - **Submission Date**
 - **Application Status**
4. Click **Start New Application** to create a new application. The **Get Started with Your Provider Application** pop-up displays.

Note: A Provider account can have multiple Applications submitted.

5. Click on **Licensing Application** and click **Continue**.
6. Complete the **General Information, Address/Contact Info, Agency Leadership**, and **Attachment** sections. After completing each section, click on **Save & Next** to move to the next section.

Note: To upload any attachments with the application, click on **Attachments** tab and click on **Upload File**. Select the file to upload and click on **Upload**. Repeat the step to upload all the remaining files with the application.

7. Verify all the details are entered and complete the field **Authorized Agent's Signature**.
8. Click on **Save and Submit**.

Knowledge Check!

Question 1: During registration, which field determines whether the user registers as a person or a business?

- A. Last 4 digits of SSN
- B. Phone
- C. Requested Profile Type
- D. Mailing Address

Question 2: Before submitting the application, what must be completed as the final confirmation step listed?

- A. Authorized Agent's Signature field
- B. Create a Provider Record
- C. Add at least one Attachment
- D. Assign a Supervisor

Module 4: Licensed Provider

This module focuses on the review and approval of a Licensed Provider application through licensing actions in C-FIRST!. While the Licensed Provider application is typically completed and submitted by the provider, this module also addresses the steps DCS staff may need to take to enter or complete an application in C-FIRST! when it is received in another format. You will start by completing or reviewing the licensing application, then progress through the key review and setup activities required to support a licensing decision creating and linking Provider records and Provider types, reviewing Provider persons, and validating training activities and background clearances.

Next, you will complete the steps to progress the application through disposition by preparing and submitting the Application Disposition for approval. Finally, you will practice the licensing outcomes that establish and maintain the Provider's standing, including creating a Conditional License and completing Annual License Issuance.

After completing this module, you will be able to:

- Complete a Licensing Application in C-FIRST!
- Conduct a Provider search, then create and link a Provider record and create a Provider Type
- Review Provider Persons, Training Activities, and Background Clearances
- Review the Application and Attachments
- Create a Conditional License
- Submit the Application Disposition for approval and complete Annual License Issuance

Lesson 1: Completing License Application in C-FIRST!

In this lesson, you will learn how to initiate a Licensed Provider workflow by creating and completing a Licensing Application in C-FIRST!. You will log in as a Licensing Consultant and enter required licensing details and ensure the application is prepared for Provider setup, validation activities, and licensing decision steps.

Learning Objectives

- Create and Complete a Licensing Application in C-FIRST!

Task 1: Completing the Application

To start creating the Licensing application, follow the steps below:

1. Log in with the credentials provided. The **Homepage** screen displays.
2. Navigate to the **Applications** tab from the Home drop-down. The **Applications Recently Viewed** screen displays.
3. Click **New** on the top right corner of the screen to create a new application. The **New Application** pop-up displays.
4. Select **Licensing Application** radio button and click **Next**. The **New Application: Licensing Application** screen displays.
5. The following are the fields that a user needs to complete in the **General Information** section:
6. Click the **Application Type** drop-down, select the *application type*. The options in the drop-down are:
 - Licensing Application
 - Licensing Anniversary Reassessment
7. Click the **Account Name** field, enter the *account name*.
8. Click the **Licensing Category** drop-down, select the *category*.
Note: All the options for this field are meant for Licensed Providers except the Foster Family (DCS and Others) option that is relevant to Foster Home Provider. The options in the drop-down are:
 - Alcohol and Drug Residential Treatment of Children and Youth
 - Boarding Home Facility
 - Child Abuse Prevention Agency
 - Child Placing Agency
 - Family Boarding Home
 - Foster Family (DCS and Others)
 - Group Care Home
 - Hospital Facility
 - Intensive Day Treatment for Children and Adolescents
 - Juvenile Detention Center
 - Maternity Home
 - Non-Traditional Childcare Agency

- Residential Care Agency
 - Residential Habilitation Facility
 - Residential Treatment of Children and Youth
 - Runaway House
 - Temporary Holding Resource
9. Click the **Provider Category** drop-down, select from the options. **Note:** Upon selecting an option from the **Provider Category** drop-down, the **Provider Organization Name** field will display.
 10. Click the **Name on License** field, enter the *name*.
 11. Click **Type of License** and select the right arrow icon to select the *type of license* from the Available section.
 12. Click the **Provider Organization Name** field, enter the *organization's name*.
 13. Click the **Status** drop-down, select the *status*. The options in the drop-down are:
 - Approved
 - Closed
 - Completed
 - Conditional License Approved
 - Denied
 - In Progress
 - Inquiry
 - Withdrawn
 14. Click the **Applicant's Governing Body Org Structure** drop-down, select from the options.
 15. Click the **Renewing an existing license?** drop-down, select from the options.
 16. Click the **Has Licensing Fee been Submitted?** drop-down, select from the options.
 17. Scroll down to the **Assignment Information** section.
 18. Click the **Assigned Supervisor** field, enter the *supervisor*.
 19. Click the **Assigned Worker** field, enter the *worker*.
 20. Click **Save**. A new licensing application has been created successfully.

Task 2: Complete Application Requirements

The Application Requirements tab will capture the information related to Quality Care, Assessment of Need, and Safety for the Licensed Provider Application.

1. Click the **Application Requirements** tab. The **Application Requirements** screen displays.
2. The following are the fields that a user needs to complete in the **Administration Requirements** section:
3. Click the **Agency Charter and By Laws** drop-down, select from the options. **Note:** This is picklist and it will capture the Agency Charter and By Laws information.
4. Click the **Board of Directors/Advisory Board** drop-down, select from the options.
5. Click the **Reference Letters for Corporate Officials** drop-down, select from the options.
6. Click the **Background Checks for Corporate Officials** drop-down, select from the options.
7. Click the **Agency Budget** drop-down, select from the options.
8. Click the **Proof of Initial 60 days Capacity to Operate and/or Line of Credit** drop-down, select from the options.
9. Click the **Liability Insurance and/or Surety Bonding Information** drop-down, select from the options.
10. Click the **TN Secretary of State Registration** drop-down, select from the options.
11. Scroll down to **Quality of Care** section.
12. Click the **Intake and Discharge Policy** drop-down, select from the options.
13. Click the **Discipline Policy** drop-down, select from the options.
14. Click the **Physical Restraint & Time Out Policy** drop-down, select from the options.
15. Click the **Search Policy** drop-down, select from the options.
16. Click the **Education Policy** drop-down, select from the options.
17. Click the **Visitation Policy** drop-down, select from the options.
18. Click the **Health Policy** drop-down, select from the options.
19. Click the **Agency Staff/Child Ratio and Level of Supervision** drop-down, select from the options.
20. Click the **Food Service Procedure** drop-down, select from the options.

21. Click the **Child Abuse Policy (screening, reporting, training)** drop-down, select from the options.
22. Scroll down to **Assessment of Need** section.
23. Click the **Five Statement of Service Need** drop-down, select from the options.
24. Click the **Copies of any contracts with the state or agencies for providing services to children** drop-down, select from the options.
25. Scroll down to **Physical Plant/Facility** section.
26. Click the **Fire Inspection** drop-down, select from the options.
27. Click the **Fire Inspection Date** drop-down, select from the options.
28. Click the **Health Environmental Safety Inspection** drop-down, select from the options.
29. Click the **Health Safety Date** drop-down, select from the options.
30. Click the **Documentation of Handicap Accessibility (as appropriate)** drop-down, select from the options.
31. Scroll down to **Safety** section.
32. Click the **Vehicle safety plan** drop-down, select from the options.
33. Click the **Safety – emergency procedures** drop-down, select from the options.
34. Click the **Disaster plan** drop-down, select from the options.
35. Click the **Procedures for control of communicable diseases** drop-down, select from the options.
36. Click **Save**. The Application Requirements section is saved successfully.

Lesson 2: Provider Setup and Processing Licensing

In this lesson, you will complete the end-to-end processing steps that support a licensing decision in C-FIRST!. You will search for the provider first to determine whether the Provider already exists in C-FIRST!, you will then complete the key steps in the licensing process from provider setup through disposition and license issuance.

Learning Objectives

- Conduct a Provider Search and create/link the Provider to the application

- Review Provider Persons associated to the Provider
- Review Training Activities and Background Clearances
- Review the application and attachments
- Create a Conditional License
- Create and Submit the Application Disposition
- Complete Annual License Issuance

Task 1: Conduct Provider Search

To search for an existing Provider, follow the steps below:

1. Navigate to the **Applications** tab from the Home drop-down. The **Applications Recently Viewed** screen displays.
2. Navigate to the desired **Licensing Application**. The **Application** screen displays.
3. Click **Create New Provider**. The **Provider Search** screen displays.
4. Click **First Name** field on the **Search By Provider Detail** section, and enter the *first name####*.

Note: Every time you create a New Provider, either through Provider tab, Application tab or Provider Search you will have to go through the Provider Search. This is to avoid the duplication of any existing Provider record.

5. Click **Search**. The search results screen displays.
Note: If the Provider record is found, click View to open the existing Provider record rather than creating a new one. Review the existing Provider structure, including any related parent/child Provider records, to confirm whether the Provider or location already exists before proceeding.

Task 2: Create Provider and Associate Provider to Application

In this task, you will verify whether a Provider already exists in C-FIRST!. If no matching Provider record is found, you will create a new Provider and link it to the application.

1. Navigate to the **Applications** tab from the Home drop-down. The **Applications Recently Viewed** screen displays.

2. Click **Create New Provider**. The **Provider Search** screen displays. **Note:** Follow the steps mentioned in the **Conduct Provider Search** task to search for an existing Provider.
3. On the **New Provider** pop-up screen, following are the fields that a user needs to complete in the **Provider Information** section:
Note: The **Account Name** field is auto-populated by C-FIRST! based on the Application.
4. Click the **First Name** field, enter the *first name####*.
5. Click the **Last Name** field, enter the *last name####*.
6. Click the **Network Provider?** drop-down, select from the options.
Note: The **Primary Contact Name** field will be auto-populated by C-FIRST! based on the Application.
7. Click the **Primary Contact Name** field, enter the *primary contact's name*.
8. Scroll down to the **Reference Numbers** section.
9. Click **SSN** field, enter the *social security number(xx-xxxxxxx)*.
10. Click **FEIN** field, enter the *number(xx-xxxxxxx)*.
11. Click **UEI#** field enter the *number(xx-xxxxxxx)*.
12. Scroll down to the **Organization Information** section:
13. Click the **Business Type** drop-down and select the *business type*.
14. Click the **Incorporation Status** drop-down, select from the options.
15. Scroll to the **ICWA Information** section:
16. Click the **Membership or Eligible for Membership?** drop-down, select from the options.
17. Click the **ICWA Eligible?** drop-down, select from the options.
18. Click the **Assigned Supervisor** field, enter *Licensing Supervisor*.
19. Click the **Assigned Worker** field, enter *Licensing Supervisor*.
20. Click **Save**. The Provider record has been created and associated successfully.

Task 3: Create Provider Type

After creating a new Provider, navigate to the record and follow the steps below to create a new Provider type:

1. Navigate to the desired Provider record. The **Provider** screen displays.
2. Click the **Provider Types** hyperlink from the **Related List Quick Links** section. The **Provider Types** list view displays.
3. Click **New**. The **New Provider Type** screen displays.
4. Select **Licensed Provider** radio button and click **Next**. The **New Provider Type: Licensed Provider** screen displays.
5. The following are the fields that a user needs to complete in the **Information** section:
6. Click **Status** field and select *Pending Approval* from the drop-down options.
7. Click the **Licensed Capacity** field, enter the *capacity*.
8. Click the **Regulated Services** and select the right arrow icon to select the *service* from the Available section. The options in the drop-down are:
 - Adoptions
 - Foster Care
 - Residential Services
 - Maternity
 - Child Abuse Prevention
 - Home Studies Only
9. Scroll down to the **Assignment Information** section.
10. Click the **Assigned Supervisor** field, enter the *supervisor*.
11. Click the **Assigned Worker** field, enter the *worker*.
12. Click **Save**. A new licensed Provider type has been created successfully.

Task 4: Review Provider Persons

1. Navigate to the Provider Record. The **Provider** screen displays.
2. Click the **Provider Persons** hyperlink from the **Related List Quick Links** section. The **Provider Persons** list view displays.
3. Click the desired hyperlink on the **Provider Person ID**. The **Provider Person** screen displays.
4. Review the fields in the **Details** section of the **Provider Person**.
5. Click the **Pencil** icon to make any updates or edits to the details.

Task 5: Review Training Activities and Background Clearances

After reviewing the details of the Provider Person, follow the steps below to review the training activities and background clearances:

1. Navigate to the desired Provider Person record. The **Provider Person** screen displays.
2. Click the **Training Activities** hyperlink from the **Related List Quick Links** section. The **Training Activities** list view displays.
3. Click the desired hyperlink on the **Training Activity Name**. The **Training Activity** screen displays the following fields: **Type, Date, Name, Expiration Date, Description, Training Hours, Completed Hours, Provider** and **Provider Person**.

Task 6: Review Application and Attachments

As a Licensing Consultant, you will now need to review the Licensing Application by following the steps below:

1. Navigate back to the Licensing Application by clicking on the **Application** tab from the Home drop-down. The **Applications** Recently Viewed list view displays.
2. Click the desired **Application Number** hyperlink. The **Application** screen displays.
3. Review the fields in the **Application Information** section.
4. Review the fields in the **Application Requirements** section.
5. Review the documents in the **Attachments** section.
6. Click the **Pencil** icon to make any updates or edits to the application.

Task 7: Create Conditional License

An existing provider will not be subject to a conditional licensing period; these providers go straight to annual licensing upon the renewal, and only new programs receive these conditional licenses. Let's practice how to process a conditional license in the system.

1. Navigate to the Provider record in C-FIRST!. The **Provider** screen displays.
2. Click the **License** hyperlink from the **Related List Quick Links** section. The **New Provider License** screen displays.

3. The following are the fields that a user needs to complete in the **Information** section:
4. Click the **Status** drop-down, select from the options. The options in the drop-down are:
 - Active
 - Completed
 - Expired
 - Pending
 - Probationary
 - Suspended
5. Click the **Date Effective** field, enter the *date*.
6. Click the **License Type** drop-down, select **90-Day Conditional License** from the options.
7. Click the **Licensing Agency** drop-down, select from the options.
8. Click the **License Category** drop-down, select from the options.
9. Click the **State** drop-down, select from the options.
10. Click **Save**. A new Provider license has been created successfully.

Task 8: Complete Application Disposition and Submit for Approval

1. Navigate to the desired Provider record. The **Provider** screen displays.
2. Click the **Provider Types** hyperlink from the **Related List Quick Links** section. The **Provider Types** screen displays.
3. Click the **Provider Type ID** for the Licensed Provider Record Type.
4. Click the **Provider Management Actions** hyperlink from the **Related List Quick Links** section. The **Provider Management Actions** screen displays.
5. Click **New**. The **New Provider Action** pop-up displays.
6. Select the **Application Disposition** radio button and click **Next**. The **New Provider Action: Application Disposition** screen displays.
7. The following are the fields that a user needs to complete in the **Information** section:
8. Click the **Application** field, enter the *application*.

9. Click the **Application Type** drop-down, select *Licensing Application*.
10. Click the **Result Reason** drop-down, select the *reason*.
11. Click the **Notes** field, enter the *notes*.
12. Click the **Application Result** drop-down, select the *result*.
13. Scroll down to the **Approval History** section:
14. Click the **Assigned Worker** field, enter the *worker*.
15. Click the **Assigned Supervisor** field, enter the *supervisor*.
16. Click **Save**. The new **Provider Action** has been created successfully.
17. Click the **Pencil** icon, to make any updates or edits to the record.
18. Click the **Submit for Approval**. The **Submit for Approval** pop-up displays.
19. Click the **Comments** field, enter the *comments*. Click **Submit**.
20. The **Provider Action** is submitted for approval.

Task 9: Review and Approve Application Disposition

1. Log in with the supervisor credentials. The **Homepage** displays.
2. Click the **Notifications** icon. The **Notifications** pop-up displays.
3. Click **Licensing Consultant is requesting approval for Provider action**. The **Approval Request** screen displays.
4. Click the **Provider Action ID** hyperlink. The **Provider Action** screen displays.
5. Review the details and navigate to the **Approval Request** screen.
6. Click **Approve**. The **Approve Provider Action** screen displays.
7. Click the **Comments** field, enter the *comments*.
8. Click **Approve**. The request is approved successfully.

Task 10: Complete Annual License Issuance

1. Navigate to the Provider record and click **Licenses** on the **Related List Quick Links** section.
2. Click on the **90-day Conditional License** record.

3. Click on the **Status** field and select **Active** from the drop-down options.
4. Click **Save**. **Note:** After the 90-day Conditional period ends, to create an annual license the user can continue with the steps below.
5. Navigate to the **Licenses** hyperlink on the **Related List Quick Links** section and click on **New** to issue an annual license.
6. Click the **License Type** drop-down, select **Annual License** from the options.
7. Click the **Licensing Agency** drop-down, select **DCS** from the options.
8. Enter other required information and click **Save**.
9. Click on the **Submit for Approval** to send for supervisor approval.

Knowledge Check!

Question 1: Which Application Type options are available on the Licensing Application?

- A. New License, Renewal License
- B. Licensing Application, Licensing Anniversary Reassessment
- C. License Request, License Audit
- D. Conditional License, Annual License Issuance

Question 2: From a Provider Person record, where do you review training completions and expirations?

- A. Training Activities related list
- B. Agreements related list
- C. Court Orders related list
- D. Placements related list

Question 3: What is the correct navigation to review training details for a specific Provider Person?

- A. Provider Person → Training Activities → Training Activity Name
- B. Provider → Agreements → Training Activities
- C. Application → Attachments → Training Certificate
- D. Provider Type → Provider Management Actions → Training Activities

Module 5: Placement Provider

In this module, you will learn how to process a **Placement Provider** in C-FIRST! from start to finish. You will begin by completing the Placement Provider application, then perform the core setup steps to establish the Provider in the system creating the Provider record and Provider Type and reviewing submitted materials for completeness. Next, you will complete the required evaluation activities and process the application through disposition. Finally, you will create a Provider Agreement and Services, route items for approval, and update the Provider Type status so the Provider can move forward appropriately in C-FIRST!.

After completing this module, you will be able to:

- Complete Placement Provider Application
- Conduct a Provider search, then create and link the Provider record to the Application
- Create a Provider Type and Provider Persons
- Review Application and Attachments
- Complete Evaluations and Submit for Approval
- Create Provider Agreement and Services, Submit for approval
- Update the Provider status

Lesson 1: Placement Provider Application in C-FIRST!

In this lesson, you will learn how to create the Placement Provider Application on C-FIRST!. You will log in as a Network Development Staff Worker and explore the tabs and sections of the application and attach documents to the application.

Learning Objectives

- Complete a Placement Provider Application in C-FIRST!

Task 1: Completing the Application

When creating the placement Provider application, you will first proceed with the following steps to complete the **Application Information** and **Application Requirements** tab by following the steps below:

1. Log in as the **Network Development Staff Member**, the **Homepage** displays.
2. Navigate to the **Applications** tab from the Home drop-down. The **Applications Recently Viewed** screen displays.
3. Click **New**. The **New Application** pop-up displays.
4. Select **Placement Provider Application** radio button and click **Next**. The **New Application: Placement Provider Application** screen displays.
5. The following are the fields that a user needs to complete in the **General Information** section:
6. Click the **Create New Provider Type?** drop-down and select the option.
7. Click **Provider Category** drop-down and select from the options. The options available are:
 - Both
 - Direct Provider
 - Parent Organization Provider
8. Click the **Provider Organization Name** field, enter the *organization name*.
9. Click the **Provider Type** drop-down, select the *Provider type*. The options in the drop-down are:
 - Adoption
 - Contracted
 - Foster Family
 - Guardianship
 - Independent Living
 - Kinship Provider
 - Licensed Provider
 - Medicaid
 - Non-Contracted
 - Placement Provider
 - Relative Caregiver Program Provider
10. Click the **Status** drop-down, select the *status*. The options available are below. **Note:** This field is mandatory.
 - Approved
 - Closed
 - Completed
 - Conditional License Approved
 - Denied

- Inquiry
 - Withdrawn
11. Scroll down to the **Business Information** section:
 12. Click the **Business Type** drop-down, select from the options.
 13. Click the **Incorporation Status** drop-down, select the *status*.
 14. Click the **FEIN** field, enter the *number(xx-xxxxxxx)*. **Note:** FEIN is Federal Employer Identification Number, a 9-digit IRS tax ID for a business.
 15. Click the **UEI#** field, enter the *number(xx-xxxxxxx)*. **Note:** UEI is Unique Entity Identifier, it is a 12-character alphanumeric ID issued by the government for federal funding.
 16. Scroll down to the **Assignment Information** section:
 17. Click the **Assigned Supervisor** field, enter the *supervisor*.
 18. Click the **Assigned Worker** field, enter the *worker*.
 19. Click **Save**. A new Placement Provider application has been created successfully.

Lesson 2: Provider Setup Overview

In this lesson, you will complete the steps to set up a Placement Provider after the application is created. You will search for existing Providers to prevent duplicates, then create and link the Provider record to the application. You will learn to create the appropriate Provider Type, review Provider Persons and then review application information. You will also complete evaluations for the Provider, documenting the outcome through Application Disposition, and submit for Approval.

Now let us learn about the different Provider Types:

- **Adoption:** The Adoption Provider Type Related List and Screen help create a new Adoption Record and edit details associated to an existing Adoption record, including status-based actions such as activation, deactivation, reactivation, and placement hold.
For an Adoption Provider to be saved as Active, the Agreement Status should be *Finalized* and must be associated to the Provider.
- **Contracted:** The Contracted Provider Type Related List and Screen help create a new Contracted Record and edit details associated to an existing Contracted record. Contracted

Provider/non-contracted Provider both are catch all Provider type and they can be created for any type of Provider which is already not included in the Provider Type related list.

A Contracted Provider Type can be *Active* only when the required approved Contracted Agreement is already associated to the Provider. **Note:** A Contracted provider is an individual or agency who has a formal written agreement with DCS to deliver specific services. Non-Contracted providers are those who do not have any formal agreement with DCS and can only provide as-needed services.

- **Foster Family:** The Foster Family Provider Type Related List and screen capture a provider that is approved, or in the process of being approved, to provide foster care services and receive foster care placements. This provider type supports the provider through inquiry and applicant stages, as well as approval, activation, hold, closure, and reassessment activities. A Foster Family Provider type can be moved to *Active* only when the required approved Foster Family Agreement is already associated with the provider. **Note:** For foster homes managed directly by DCS, the Provider record is managed by DCS and is linked under DCS as the Parent Provider Organization. For foster homes managed by a Placement Provider, the Placement Provider organization is set up as the Parent Provider Organization, and the foster home is linked to that parent through the appropriate hierarchy setup in C-FIRST!. In those cases, the Placement Provider manages the related Provider data under its organizational structure. For example, Youth Villages would have its own parent provider record, and the foster homes or residential sites it manages would be set up as separate child provider records linked back to Youth Villages.
- **Guardianship:** The Guardianship Related List and Screen help create a new Guardianship Record and edit details associated to an existing Guardianship record. A Guardianship Provider Type can be moved to *Active* only when the required *SPG Subsidy* agreement with a *Finalized* status is already associated to the Provider and the agreements are created systematically on the Provider record.

- **Independent Living:** The Independent Living Related List and Screen help create a new Independent Living Record and edit details associated to an existing Independent Living record. This is not a placement provider type. Independent Living providers are only entered for youth who receive an Independent Living allowance and must be set up as providers so payment can be issued. An Independent Living record can only be moved to Active when an approved Independent Living Agreement is associated with the Provider.
- **Kinship Provider:** The Kinship Provider Related List and Screen are used specifically for kinship foster homes to create new Kinship Provider Records, edit details associated to an existing Kinship Provider record and to manage provider type through activation, reactivation, deactivation, placement hold, and emergency or expedited approval conditions.
- **Licensed Provider:** The Licensed Provider Related List and Screen create a new Licensed Provider Record and edit details associated to an existing Licensed Provider record. This provider type applies only to providers seeking licensure by DCS. In practice, this work is managed by a small team in Central Office.
- **Non-Contracted:** The Non-Contracted Related List and Screen create a new Non-Contracted Record and edits details associated to an existing non-contracted record. A Non-Contracted Provider Type can be *Active* only when the Provider has exactly one active Site Address, exactly one active Mailing Address, at least one active Remittance Address, and an associated Non-Contracted Agreement with an Approved status.
- **Placement Provider:** The Placement Provider Related List and Screen create a new Placement Provider Record and edit details associated with an existing Placement Provider record. **Note:** A Provider organization or facility that participates in the DCS Network Provider system and can accept child placements, such as Youth Villages.
- **Relative Caregiver Program:** The Relative Caregiver Program Provider Related List and Screen create a new Relative Caregiver Program Provider Record and edits details associated to an existing Relative Caregiver Program Provider

record. This Provider Type is used to manage Provider Status and placement holds, and maintain the information needed for subsidy compliance and payment processing. It can be moved to *Active* only when the Provider has at least one Payee set up and meets the required address conditions when the Provider has exactly one active Mailing Address and at least one active Remittance Address. **Note:** A Relative Caregiver Provider is only set up if a family is receiving a stipend.

Learning Objectives

- Conduct a Provider Search to avoid duplicate records
- Create a Provider and associate to Application
- Review of the Application and Attachments
- Complete required Evaluation
- Create and Submit an Application Disposition for Approval
- Review and Approve the Application Disposition

Task 1: Conduct Provider Search

To search for an existing Provider, follow the steps below:

1. Navigate to the **Applications** tab from the Home drop-down. The **Applications Recently Viewed** screen displays.
2. Navigate to the desired **Placement Provider Application**. The **Application** screen displays.
3. Click **Create New Provider**. The **Provider Search** screen displays.
4. Click **First Name** field on the **Search By Provider Detail** section, enter the first name. **Note:** Every time you create a New Provider, either through Provider tab, Application tab or Provider Search you will have to go through the Provider Search. This is to avoid the duplication of any existing provider record.
5. Click **Search**. The search results screen displays. **Note:** If the Provider record is found and already exists, the user will select the **View** and navigate to that Provider's record.

Task 2: Create Provider and Associate Provider to Application (Link)

After conducting a search for the Provider, follow the steps below to create a New Provider and Associate the Provider with the application:

1. Navigate to the **Applications** tab from the Home drop-down. The **Applications Recently Viewed** screen displays.
2. Click **Create New Provider**. The **Provider Search** screen displays. **Note:** Follow the steps mentioned in the **Conduct Provider Search** task to search for an existing Provider.
3. Click **New Provider** to create a New Provider if the Provider record is not found. The **New Provider** pop-up screen displays.
4. The following are the fields that a user needs to complete in the **Provider Information** section:
Note: The **Account Name** field is auto-populated by C-FIRST! based on the Application.
5. Click the **First Name** field, enter the *first name####*.
6. Click the **Last Name** field, enter the *last name####*.
7. Click the **Network Provider?** drop-down, select from the options.
Note: The **Primary Contact Name** field will be auto-populated by C-FIRST! based on the Application.
8. Click the **Primary Contact Name** field, enter the *primary contact's name*.
9. Scroll down to the **Reference Numbers** section.
10. Click **SSN** field, enter the *social security number(xx-xxxxxxx)*.
11. Click **FEIN** field, enter the *number(xx-xxxxxxx)*.
12. Click **UEI#** field enter the *number(xx-xxxxxxx)*.
Note: The SSN and UEI fields are mandatory fields.
13. Scroll down to the **Organization Information** section:
14. Click the **Business Type** drop-down and select the *business type*.
15. Click the **Incorporation Status** drop-down, select from the options.
16. Scroll to the **ICWA Information** section:
17. Click the **Membership or Eligible for Membership?** drop-down, select from the options.
18. Click the **ICWA Eligible?** drop-down, select from the options.

19. Click the **Assigned Supervisor** field, enter *FCS Program Specialist*.
20. Click the **Assigned Worker** field, enter *FCS Program Specialist*.
21. Click **Save**. The Provider record has been created and associated successfully.

Task 3: Create a New Provider Person

1. Navigate to **Persons** tab from the Home drop-down.
2. Select the appropriate **Persons** from the search results. The **Persons** list view displays.
3. Select the **Search Persons** located in the upper right area. The **Person Search** screen opens.
4. Click the **Last Name** field, enter the *last name####*.
5. Click the **First Name** field, enter the *first name####*.
6. Click the **Search**. C-FIRST! executes the search and displays matching results in the **Search Results** section.
7. Review the search results list for potential matches. Each result displays the person's name, date of birth, and SSN (last four digits).
8. If a matching record displays, select the **Person Name** hyperlink to open and review the record details. The **Person Detail** screen displays.
9. If no match exists, select the **Clear** to reset the search fields. All search criteria fields clear.
10. Click **New Person**. The **New Person** pop-up displays.
11. Click the **First Name** field, enter the *first name####*.
12. Click the **Last Name** field, enter the *last name####*.
13. Click the **Gender at Birth** drop-down and select the *gender*.
14. Click the **Date of Birth Unknown** drop-down and select from the options.
15. Click the **Date of Birth** field, enter the *date*.
16. Click the **Ethnicity** drop-down and select the *ethnicity*.
17. Click the **Race** field, then click the right arrow icon to select the race of person from the **Available** section.
18. Click **Save**. The person record is created.

Task 4: Create Provider Type

To create the Provider type you will have to navigate to view the comprehensive details of the Provider record created above. Follow the steps below:

1. Navigate to the above Provider record. The **Provider** screen displays.
2. Click the **Provider Types** hyperlink from the **Related List Quick Links** section. The **Provider Types** list view displays.
3. Click **New**. The **New Provider Type** screen displays.
4. Select **Placement Provider** radio button and click **Next**.
5. Click the mandatory **Status** drop-down and select *Pending Approval* from the options.
6. Click **Date Effective** field and enter the *date*.
7. Click the **Assigned Supervisor** field, enter the *supervisor*.
8. Click the **Assigned Worker** field, enter the *worker*.
9. Click **Save**. The Provider Type record screen displays.



Process Tip!

Setting up Private Providers & Provider Hierarchies: Private Providers can be created as a Provider Organization in the system. Their hierarchical structure is set up directly from the Provider Main screen. When the **Provider Category** is **Both** or **Direct**, you must capture the Parent Provider Organization Name. The Parent Provider Organization Name the user provides determines which Provider setup/hierarchy applies. If a Parent Provider Organization exists, designated users from that organization will log in to C-FIRST! to manage Provider and related data on the C-FIRST! side. On the Provider Main screen, use the **Direct Provider Related List** to look up the Providers they manage. If someone logs in as the **Provider Organization**, they can view all organization data and all Providers/orgs managed under that parent provide record.

Please see below for an example:

- A parent organization may be an organization like Youth Villages. Each Youth Village foster home falls under the **Parent Provider** record as well as each separate residential site (such as, Rose Center, Bartlett, etc.) It is critical for payment purposes that we do not create multiple parent organizations but link new foster home or residential homes to the existing parent organization.

Task 5: Review Application and Attachments

1. Navigate to the Placement Provider Application by clicking on the **Application** tab from the drop-down on the **Homepage**. The **Applications** Recently Viewed list view displays
2. Click the desired hyperlink on **Application Number**. The **Application Information** screen displays.
3. Review the fields in the **General Information** section.
4. Review the documents in the **Attachments** section.
5. Click the **Pencil** icon to make any updates or edits to the application.



System Tip!

C-FIRST! and the Provider Portal interface with each other. This means that information that is updated in C-FIRST! and the Provider Portal are exchanged between the two and information is shared and updated.

Task 6: Complete Evaluations

The Application Evaluation tab will capture the information required to evaluate the Placement Provider application. These fields do not display foster homes or other provider types; they don't apply when you are creating a foster home provider type.

Let's continue and access the **Application Requirements** tab.

1. Click the **Application Requirements** tab from the same Application screen. Click the **Application Evaluations** tab. The **Application Evaluations** screen displays. **Note:** If you click the **Pencil** icon, you will see that the fields are now editable.
2. The following are the fields that you will need to complete in the **Evaluation 1** section:
3. Click **Attachment A - Capacity Grid** field, enter the *score*.
4. Click **Attachment B - Quality & Risk Assessment Tool** field, enter the *score*.
5. Click **Attachment C - Ability to Deliver LOS's** field, enter the *score*.

6. Click **Attachment D - Clinical Programming** field, enter the *score*.
7. Click **Attachment E - Understanding of Requirements** field, enter the *score*.
8. Click **Attachment F - Plan to Complete Requirements** field, enter the *score*.
9. Click **Attachment G - Project Management** field, enter the *score*.
10. Click **Attachment H - Material or Pending Litigation** field, enter the *score*.
11. Click **Attachment I - Commitment to Diversity** field, enter the *score*.
12. Click **Attachment J - Current Contracts** field, enter the *score*.
13. Click **Attachment K - Legal Statuses** field, enter the *score*.
14. Click **Attachment L - Independence Services** field, enter the *score*.
15. Click **Save**. **Note:** The **Total Score** field is calculated after upon save and will display the score for **Evaluation 1** section.
16. Complete the remaining **Evaluation** sections.
17. The following are the fields that a user needs to complete in the **Evaluators Information** section:
18. Click the **Evaluator 1** field, enter the *name*.
19. Click the **Date of Evaluation** field, enter the *date*.
20. Click the **Evaluator 2** field, enter the *name*.
21. Click the **Date of Evaluation** field, enter the *date*.
22. Click the **Evaluator 3** field, enter the *name*.
23. Click the **Date of Evaluation** field, enter the *date*.
24. Click **Save**. The edits are saved successfully.

Task 7: Complete Application Disposition and Submit for Approval

1. Navigate to the **Provider** tab from the Home drop-down. The **Provider Recently Viewed** screen displays.
2. Click the desired **Account Name** hyperlink column to open the Provider record. The Provider **Details** screen displays.
3. Click the **Provider Types** hyperlink from the **Related List Quick Links** section. The **Provider Types** screen displays.
4. Click the **Provider Type ID** hyperlink of the Placement Provider to view the record. The **Provider Type** screen displays.

5. Click the **Provider Management Actions** hyperlink from the **Related List Quick Links** section. The **Provider Management Actions** screen displays.
6. Click **New**. The **New Provider Action** pop-up displays.
7. Select the **Application Disposition** radio button and click **Next**. The **New Provider Action: Application Disposition** screen displays.
8. The following are the fields you will need to complete in the **Information** section:
9. Click the **Application** field, enter the *application*. **Note:** You can click on the magnifying glass and search for the Application and select from the list.
10. Click the **Application Type** drop-down, select the type *Placement Provider Application*. The options in the drop-down are:
 - Foster Family Anniversary Reassessment
 - Foster Family Application
 - Foster Family Biannual Reassessment
 - Foster Family Reactivation
 - Licensing Anniversary Reassessment
 - Licensing Application
 - Placement Provider Application
 - Vendor Application
11. Click the **Result Reason** drop-down, select the relevant reason. The options in the drop-down are:
 - Conduct
 - CPS History
 - Criminal Charges/Convictions
 - Documentation Time Frames
 - Financial
 - Home Study Concerns
 - Inadequate Parenting
 - Medical
 - Other
 - Over Capacity
 - Pre-Service Training
 - Voluntary Withdrawal
12. Click the **Notes** field, enter the *notes*.

13. Click the **Related Provider Action** field, enter the appropriate *Provider action*.
14. Click the **Application Result** drop-down, select the result. The options in the drop-down are:
 - Failure to Pursue
 - Intent to Approve
 - Intent to Deny
 - Not Subject
 - Withdrawn
15. The following are the fields you will need to complete in the **Approval Information** section:
16. Click the **Assigned Worker** field, enter the assigned *worker*.
17. Click the **Assigned Supervisor** field, enter the application's assigned *supervisor*.
18. Click **Save**. The new **Provider Action** has been created successfully.
19. Click the **Pencil** icon, to make any updates or edits to the record.
20. Click **Submit for Approval**. The **Submit for Approval** pop-up displays.
21. Click **Comments** field and enter the *comments*.
22. Click **Submit** and the **Provider Action** will be submitted to the supervisor for approval.

Note: The steps for creating a Provider and for assisting a Provider with portal account creation are addressed in *Module 2* in this learner guide.

There may be certain times where staff need to process a new provider in C-FIRST! that has not submitted an application. For providers that still need to be setup without an application, then DCS staff must complete all formalities to process the provider outside of the system and then create the Provider Account in C-FIRST!

Task 8: Review Q RTP (Qualified Residential Treatment Program)

1. On the Provider record from the Home drop-down. The **Provider** screen displays.
2. Click the **Q RTP** hyperlink from the **Related List Quick Links** section. The **Q RTP** list view displays. **Note:** To create a new Q RTP record, you can click **New** on the far-right of the screen.
3. Review the following fields in the **Information** section: **Q RTP ID**, **Start Date**, and **End Date**.

Task 9: Review and Approve Application Disposition

1. Log in using the supervisor's credentials. The **Homepage** displays.
2. Click the **Notifications** icon. The **Notifications** pop-up displays.
3. Click **A new Placement Provider Application Requires Your Attention**. The **Task** screen displays.
4. Click the **Related To** hyperlink. The **Application** screen displays.
5. Review the **Application** details and navigate to the **Task** screen.
6. Click **Mark Complete**. **Note:** After clicking **Mark Complete**, the button will now be displayed as **Completed**.

Lesson 3: Agreement and Services

In this lesson, you will learn how to complete the next steps for an approved Placement Provider by creating the required Agreement and Services in C-FIRST!.

You will create the Provider Agreement, add and associate services, and route the agreement for review and approval. You will then log in to review and approve the agreement. Finally, you will update the Provider Type status, so the Provider record accurately reflects its current stage in the process.

Now you must understand the difference between a Provider Agreement and a Case Agreement:

- **Provider Agreement:** It is the formal agreement record used to create, maintain, and approve the contractual arrangement for services a Provider delivers.
- **Case Agreement:** The Case Agreements are created from a person record or case for an individual child or youth. These agreements are used to establish and manage ongoing payments for children and youth. Examples include adoption assistance, SPG subsidies, IL allowance, and Relative Caregiver stipends. Key details include the Agreement Start Date, Agreement End Date, Payment Start Date, Payment End Date, and monthly payment amount.

Learning Objectives

- Create a Provider Agreement and associate required services
- Submit the agreement for review and approval
- Review and approve an agreement as a supervisor
- Update the Provider Type status field

Task 1: Create Provider Agreement, Services and Submit for Approval

1. Navigate to the desired **Provider** record. The **Provider** screen displays.
2. Click the **Agreements** hyperlink from the **Related List Quick Links** section. The **Agreements** list view displays.

3. Click **New**. The **New Agreement** pop-up displays.
4. Select the **Contracted** radio button and click **Next**. The **New Agreement: Contracted** screen displays.
5. The following are the fields that a user needs to complete in the **Information** section:
6. Click the **Agreement Start Date** field, enter the *date*.
7. Click the **Agreement End Date** field, enter the *date*.
8. Click the **Sub-Contractors** drop-down, select from the options.
9. Click the **Contract ID** field, enter the *ID*.
10. Scroll down to the **Approval History** section.
11. Click the **Assigned Worker** field, enter the *worker*.
12. Click the **Assigned Supervisor** field, enter the *supervisor*.
13. Click **Save**. A new contracted agreement has been created successfully.
14. Click the **Agreement Services** hyperlink from the **Related List Quick Links** section. The **Agreement Services** list view displays.
15. Click **Add Services**. The **Associate Services** screen displays.
16. Click the **Any Taxonomy Level Search** field, enter the *level*. Click **Search**. The search results display.
17. Click the checkbox on the desired record. Click **Associate**. The record has been associated successfully

Task 2: Review Agreement and Update Provider Type Status

1. Log in using the credentials. The **Homepage** displays.
2. Click the **Notifications** icon. The **Notifications** pop-up displays.
3. Click **Network Development Staff Member assigned you a task**. The **Task** screen displays.
4. Click the **Related To** hyperlink. The **Agreement** screen displays.
5. Review the **Agreement** details and navigate to the **Task** screen.
6. Click the **Pencil** icon to make any updates or edits.
7. Click the **Status** drop-down, update the status as *Completed*.
8. Click **Save**. The updates are saved successfully.
9. Click the **Mark Complete**. **Note:** After clicking the **Mark Complete**, the button will now be displayed as **Completed**.

Knowledge Check!

Question 1: What is the correct navigation path to start creating a Placement Provider Application?

- A. Provider tab → New Provider Type
- B. Applications tab → New → Placement Provider Application
- C. Home tab dropdown → Programs → New
- D. Cases tab → New Case

Question 2: If the Provider Search returns an existing Provider record, what is the instructed next action?

- A. Select View and navigate to the Provider record
- B. Select New Provider to overwrite the record
- C. Open Attachments to confirm documentation
- D. Create a Provider Type without opening the provider

Question 3: When creating a new Provider from the Application workflow, which field is stated as auto-populated based on the Application?

- A. FEIN
- B. UEI#
- C. Account Name
- D. Business Type

Module 6: Vendor/DPA (Delegated Purchase Authority) Provider

In this module you will learn how to initiate and manage a Vendor/DPA (Delegated Purchase Authority) Provider in C-FIRST!. A Vendor/DPA Provider is an individual or organization that DCS contracts with to provide a service through a service referral, previously known as a case service request. The process begins when an individual or organization interested in contracting with DCS submits a provider application through the Provider Portal. Members of the public can access the portal by visiting the Provider Portal link that will be shared later. You will begin with completing the Vendor Application and then move into core Provider Setup, searching for existing Providers to prevent duplicates, creating/linking Provider records, assigning the Provider type, and reviewing application documentation. You will then practice advancing the application through evaluation and disposition and finalize the work by creating and approving the Provider Agreement and services and updating the Provider's status.

After completing this module, you will be able to:

- Complete a Vendor Application in C-FIRST!
- Conduct a Provider search, then create and link the Provider record to the Application
- Create a Provider Type, Review Application/Attachments
- Complete Evaluations and Submit for Approval
- Create Contracted Agreement and Services, route for approval
- Update the Provider status

Lesson 1: Vendor Application in C-FIRST!

In this lesson, you will learn how to start the Vendor/DPA process in C-FIRST! by creating a Vendor Application. Although the Provider Portal can be used to submit an application, the steps covered in this lesson begin in C-FIRST!. If application information was submitted through the Provider Portal, some fields may be auto-populated in C-FIRST!. Contracting staff should then review any prepopulated information for completeness and accuracy before continuing. You will then enter

or confirm the required application details and ensure the request is ready to move into Provider set up and review activities.

Note: If Vendor Application information was submitted through the Provider Portal, some fields may be auto-populated in C-FIRST!.

Learning Objectives

- Complete a Vendor Application in C-FIRST!

Task 1: Completing the Application

To start creating the Vendor application, follow the steps below:

1. Log in using the credentials. The **Homepage** screen displays.
2. Navigate to the **Applications** tab from the Home drop-down. The **Applications Recently Viewed** screen displays.
3. Click the **New** on the top right corner of the screen to create a new application. The **New Application** pop-up displays.
4. Select **Vendor Application** and click **Next**. The **New Application: Vendor Application** screen displays.
5. The following are the fields that a user needs to complete in the **General Information** section:
Note: The **Application Type** drop-down is auto-populated by C-FIRST!
6. Click the **Resource Name** field, enter the *name*.
7. Click the **Provider Type** drop-down, select *Contracted*.
8. Click the **Provider Category** drop-down, select from the options.
9. Click the **Provider Organization Name** field, enter the *organization's name*.
10. Click the **Status** drop-down, select from the options.
11. Scroll to the **Contact Information** section.
12. Click the **Primary Contact Name** field, enter the *primary contact's name*.
13. Click the **Primary Contact Phone** field, enter the *number*.
14. Scroll to the **Business Information** section.
15. Click the **Business Type** drop-down, select from the options.
16. Click the **Incorporation Status** drop-down, select from the options.
17. Click **Save**. A new vendor application has been created successfully.

Lesson 2: Provider Setup Overview

In this lesson, you will establish the Vendor/DPA (Delegated Purchase Authority) Provider in C-FIRST! by completing the core Provider setup workflow. You will search for an existing Provider, create and link the Provider record to the application when needed, create the appropriate Provider Type, and review application and attachments. You will also complete evaluations and move the application through disposition, submission, and approval so the Provider can progress to agreement creation.

Learning Objectives

- Conduct a Provider Search to prevent duplicate records
- Create a Provider and associate to Application
- Review the Application and Attachments
- Complete required Evaluation
- Create and Submit an Application Disposition for Approval
- Review and Approve the Application Disposition

Task 1: Conduct Provider Search

To search for an existing Provider, follow the steps below:

1. Navigate to the **Applications** tab from the Home drop-down. The **Applications Recently Viewed** screen displays.
2. Navigate to the desired **Vendor Application**. The **Application** screen displays.
3. Click **Create New Provider**. The **Provider Search** screen displays.
4. Click **First Name** field on the **Search By Provider Detail** section, enter the first name. **Note:** Every time you create a New Provider, either through Provider tab, Application tab or Provider Search you will have to go through the Provider Search. This is to avoid the duplication of any existing provider record.
5. Click **Search**. The search results screen displays. **Note:** If the Provider record is found and already exists, the user will select the **View** and navigate to that Provider's record.

Task 2: Create Provider and Associate Provider to Application

After conducting a search for the Provider, follow the steps below to create a new Provider and associate the Provider with the application:

1. Navigate to the **Applications** tab from the Home drop-down. The **Applications Recently Viewed** screen displays.
2. Click **Create New Provider**. The **Provider Search** screen displays. **Note:** Follow the steps mentioned in the **Conduct Provider Search** task to search for an existing Provider.
3. Click the **New Provider** to create a new Provider if the Provider record is not found. The **New Provider** pop-up screen displays.
4. The following are the fields that a user needs to complete in the **Provider Information** section:
Note: The **Account Name** field is auto-populated by C-FIRST! based on the Application.
5. Click the **First Name** field, enter the *first name####*.
6. Click the **Last Name** field, enter the *last name####*.
7. Click the **Network Provider?** drop-down, select from the options.
Note: The **Primary Contact Name** field will be auto-populated by C-FIRST! based on the Application.
8. Click the **Primary Contact Name** field, enter the *primary contact's name*.
9. Scroll down to the **Reference Numbers** section.
10. Click **SSN** field, enter the *social security number(xx-xxxxxxx)*.
11. Click **FEIN** field, enter the *number(xx-xxxxxxx)*.
12. Click **UEI#** field enter the *number(xx-xxxxxxx)*.
13. Scroll down to the **Organization Information** section:
14. Click the **Business Type** drop-down and select the *business type*.
15. Click the **Incorporation Status** drop-down, select from the options.
16. Scroll to the **ICWA Information** section:
17. Click the **Membership or Eligible for Membership?** drop-down, select from the options.
18. Click the **ICWA Eligible?** drop-down, select from the options.
19. Click the **Assigned Supervisor** field, enter *Contracting Member*.
20. Click the **Assigned Worker** field, enter *Contracting Member*.

21. Click **Save**. The Provider record has been created and associated successfully.

Task 3: Add Provider Address

Task 4: Create Provider Type

After creating a new Provider, navigate to the record and follow the steps below to create a new Provider type:

1. Click the Provider hyperlink from the Navigation Links section to navigate to the Provider record. The **Provider** screen displays.
2. Click the **Provider Types** hyperlink from the **Related List Quick Links** section. The **Provider Types** list view displays.
3. Click **New**. The **New Provider Type** screen displays.
4. Select **Contracted** radio button and click **Next**. The **New Provider Type: Contracted** screen displays.
5. The following are the fields that a user needs to complete in the **Information** section:
6. Click the **Notes** field, enter the *notes*.
7. Click the **Status** drop-down, select the *status*. **Note:** The **Status** drop-down will be auto-populated by C-FIRST! as *Pending Approval*.
8. Click the **Date Effective** field, enter the *date*.
9. Scroll down to the **Assignment Information** section.
10. Click the **Assigned Supervisor** field, enter the *supervisor*.
11. Click the **Assigned Worker** field, enter the *worker*.
12. Click **Save**. A new Contracted Provider type has been created successfully.

Task 5: Review Application and Attachments

In this task you will learn to review the Vendor Application as part of the evaluation process by following the steps below:

1. Navigate back to the Vendor Application by clicking on the **Application** tab from the Home drop-down. The **Applications Recently Viewed** list view displays.

2. Click the desired **Application Number** hyperlink. The **Application** screen displays.
3. Review the fields in the **Application Information** section.
4. Review the fields in the **Application Requirements** section.
5. Review the documents in the **Attachments** section.
6. Click the **Pencil** icon to make any updates or edits to the application.

Task 6: Complete Application Disposition and Submit for Approval

1. Navigate to the **Provider** tab from the Home drop-down. The **Provider Recently Viewed** screen displays.
2. Click the desired Provider record. The **Provider** screen displays.
3. Click the **Provider Types** hyperlink from the **Related List Quick Links** section. The **Provider Types** screen displays.
4. Click the **Provider Type ID** for the Contracted Provider Record Type.
5. Click the **Provider Management Actions** hyperlink from the **Related List Quick Links** section. The **Provider Management Actions** screen displays.
6. Click **New**. The **New Provider Action** pop-up displays.
7. Select the **Application Disposition** radio button and click **Next**. The **New Provider Action: Application Disposition** screen displays.
8. The following are the fields that a user needs to complete in the **Information** section:
9. Click the **Application** field, enter the *application*.
10. Click the **Application Type** drop-down, select *Vendor Application*.
11. Click the **Result Reason** drop-down, select the *reason*.
12. Click the **Notes** field, enter the *notes*.
13. Click the **Application Result** drop-down, select the *result*.
14. Scroll down to the **Approval History** section:
15. Click the **Assigned Worker** field, enter the *worker*.
16. Click the **Assigned Supervisor** field, enter the *supervisor*.

17. Click **Save**. The new **Provider Action** has been created successfully.
18. Click the **Pencil** icon, to make any updates or edits to the record.
19. Click the **Submit for Approval**. The **Submit for Approval** pop-up displays.
20. Click the **Comments** field, enter the *comments*. Click **Submit**.
21. The **Provider Action** is submitted for approval.

Task 7: Review and Approve Application Disposition

1. Log in using the supervisor's credentials. The **Homepage** displays.
2. Click the **Notifications** icon. The **Notifications** pop-up displays.
3. Click **A new Vendor Application Requires Your Attention**. The **Task** screen displays.
4. Click the **Related To** hyperlink. The **Application** screen displays.
5. Review the **Application** details and navigate to the **Task** screen.
6. Click the **Mark Complete**. **Note:** After clicking the **Mark Complete**, the button will now be displayed as **Completed**.

Lesson 3: Agreement and Services

In this lesson, you will complete the steps needed to activate a Vendor/DPA Provider by creating and managing agreements, in C-FIRST!. You will create the Provider Agreement, add and associate services, route the agreement for review and approval, and update the Provider Type status. You will also review how a service request is viewed in C-FIRST!, how supervisor approval moves the request forward, and how an approved request connects to provider selection, service logs, and invoicing. **Note:** A provider cannot be referred for services in C-FIRST! if they do not have an associated agreement for the services that they offer. They must have a service agreement for all services they offer. Many will have more than one agreement.

Learning Objectives

- Create a Provider Agreement and associate services
- Submit the agreement for review and approval

- Review an approved agreement and update provider status
- Review a Service Request in C-FIRST! and how supervisor approval moves the referral forward in the process
- Identify how provider approval, associated services, and completed status enable service referrals, service logs in C-FIRST!

Task 1: Create Provider Agreement, Services and Submit for Approval

In this task, you will create the Provider Agreement for the approved Vendor/DPA Provider and associate the appropriate services. After entering the required agreement information and confirming the services, you will submit the agreement for approval.

1. Navigate to the desired **Provider** record. The **Provider** screen displays.
2. Click the **Agreements** hyperlink from the **Related List Quick Links** section. The **Agreements** list view displays.
3. Click **New**. The **New Agreement** pop-up displays.
4. Select the **Contracted** radio button and click **Next**. The **New Agreement: Contracted** screen displays.
5. The following are the fields that a user needs to complete in the **Information** section:
6. Click the **Agreement Start Date** field, enter the *date*.
7. Click the **Agreement End Date** field, enter the *date*.
8. Click the **Sub-Contractors** drop-down, select from the options.
9. Click the **Contract ID** field, enter the *ID*.
10. Scroll down to the **Approval History** section.
11. Click the **Assigned Worker** field, enter the *worker*.
12. Click the **Assigned Supervisor** field, enter the *supervisor*.
13. Click **Save**. A new contracted agreement has been created successfully.
14. Click the **Agreement Services** hyperlink from the **Related List Quick Links** section. The **Agreement Services** list view displays.
15. Click **Add Services**. The **Associate Services** screen displays.
16. Click the **Any Taxonomy Level Search** field, enter the *level*. Click **Search**. The search results display.
17. Click the checkbox on the desired record. Click **Associate**. The record has been associated successfully.

18. Navigate back to the **Agreement Services Details** screen.
19. Access the **Related List Quick Links**.
20. Click on the **Master Service Rates** hyperlink. The **Master Service Rates** screen displays.
21. Select **New Master Service Rate**. The pop-up displays.
22. In the **Unit Cost** field, enter the unit cost.
23. In the **Master Service Rate Start Date** field, enter today's date.
24. In the **Master Service Rate End Date** field, enter the last date the provider provides service.
25. Click **Save**. The **Master Service Rate Details** screen populates with the record saved.
Note: Once the Provider updates the agreement records and saves this information, C-FIRST! generates a notification for the Supervisor to review the agreement.

Task 2: Review Agreement and Update Provider Status

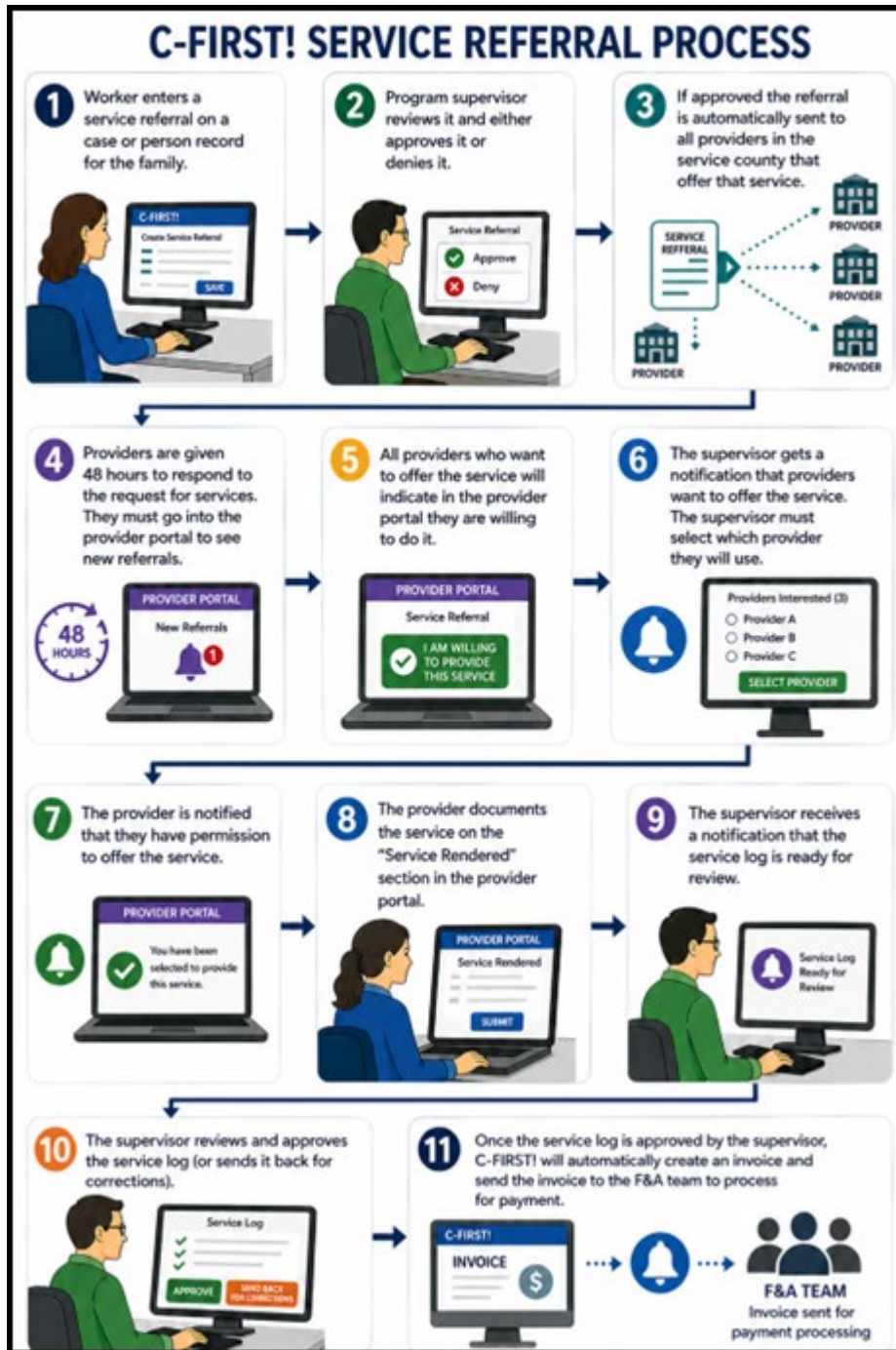
In this task, the supervisor reviews the agreement details from the assigned task, makes any needed updates, and completes the approval step. After reviewing the agreement, the supervisor updates the task status to **Completed**, saves the record, and marks the task complete.

1. Log in using the supervisor's credentials. The **Homepage** displays.
2. Click the **Notifications** icon. The **Notifications** pop-up displays.
3. Click **Contracting Member assigned you a task**. The **Task** screen displays.
4. Click the **Related To** hyperlink. The **Agreement** screen displays.
5. Review the **Agreement** details and navigate to the **Task** screen.
6. Click the **Pencil** icon to make any updates or edits.
7. Click the **Status** drop-down, update the status as *Completed*.
8. Click **Save**. The updates are saved successfully.
9. Click **Mark Complete**. **Note:** After clicking **Mark Complete**, the button will now be displayed as **Completed**.

Task 3: View Service Request

In this task, you will review how a service request appears in C-FIRST! after it is created for a case. The supervisor reviews the service request as part of the approval process before the referral moves forward. This step helps learners understand that the service referral workflow includes a supervisory approval point before provider selection and service delivery activities continue.

Refer to the image below for additional information on the Service Referral and Service Log process.



The service referral process in C-FIRST! begins when a worker creates a new service request and selects the service type. The request is reviewed through the program supervision process rather than going to Fiscal at the beginning. After the provider is confirmed, the Provider Portal creates a Service Log so the provider can document services rendered. Once the Service Log is approved, C-FIRST! auto-generates

an invoice and sends it to the Fiscal Team for review and payment management.

1. Navigate to the desired **Provider** record. The **Provider** screen displays.
2. Click the **Service Requests** hyperlink from the **Related List Quick Links section**.
3. Click **Service Request ID** hyperlink, the **Service Request Details** screen displays
4. Review the fields in the **Service Request Information** section: **Service Request ID, Request Type, Service Taxonomy ID, Status, Service Category** and **Service Type**.

Note: The process for approving service referrals and other records is in the Supervisor module. Once the service request is approved, C-FIRST! creates provider contact records and notifies providers of the request. Providers respond through the external Provider Portal, and the supervisor reviews those responses to select the provider who will deliver the service.



Process Tip!

- Once the service referral record is approved by the Supervisor, the provider contact is auto-created. At this point, after approval, all of the providers are notified of the request and they access the external **Provider Portal** and accept or deny the request and enter all necessary information. DCS should allow providers two business days to respond to the request. There can be multiple providers who submit their willingness to complete the service. The supervisor logs into C-FIRST and selects which provider will offer the service.
- There is a way to select a direct provider on the service referral. This option should **ONLY** be used when there is a court order or supervisor's direction that specifies a specific provider. In all other circumstances, all providers must be notified.

Task 4: View Service Log

Next, the provider provides services, accesses the **Provider Portal** and updates the record as "services rendered" and updates the following information: *Client Served, Provider, Service, Service Location, Service Unit Type*, and other information. This information is pulled into

C-FIRST! and a **Service Log** is created. The **Service Log** populates with information from the Provider Portal.

1. Navigate to the **Provider** record.
2. Click the **Services Log** hyperlink from the **Related Quick Links** section.
3. Select the **Service Log** record. The **Service Log Details** screen displays.
4. Access the **Service Information** section and review the information.

Note: Once this service log is approved, C-FIRST! auto-generates an invoice. This invoice is sent to Fiscal for payment.

Knowledge Check!

Question 1: In the Vendor Application General Information section, which Provider Type is the user instructed to select?

- A. Placement Provider
- B. Foster Family
- C. Contracted
- D. Kinship Provider

Question 2: What system action occurs after submitting an Application Disposition for approval?

- A. The Provider Type becomes Active immediately
- B. The Application is auto-closed as Completed
- C. A Contract ID is generated automatically
- D. An approval record and task are created for the first approver

Question 3: What is the key action performed on the task after reviewing and saving the agreement updates?

- A. Reassign
- B. Mark Complete
- C. Reject
- D. Create New Provider Type

Module 7: Associated Related Lists

This Associated Related Lists module explains how to view and manage key Provider-related records that support oversight, compliance, and operational tracking in child welfare. You will learn how to access and interpret a Provider Corrective Action Plan which is a structured set of actions to address identified deficiencies and improve quality of care. You will also learn about Provider Appeals; the formal process Providers use to dispute or request review of agency decisions. The module also covers how to review Intakes linked to a Provider, including situations where abuse is reported and the Provider is associated with the intake, as well as how to view the Provider's National Provider Identification (NPI) number and its status from the NPI related list.

After completing this module, you will be able to:

- Review Associated Cases to access and Case Agreements
- Review Corrective Action Plans
- Review Intakes and Placements

Lesson 1: Access and Review the Related List Quick Links

In this lesson, you will first use Associated Cases to quickly locate and review all Provider-linked case activities. You will then review the Provider's Intake list to identify any reported concerns that could impact placement or service decisions. If gaps or deficiencies are identified, you will create a Corrective Action Plan to document required steps and track progress as outlined in the policy.

Learning Objectives

- View Associated Cases Related Lists
- Review Placements and Provider-linked Intakes

Task 1: Review Associated Cases

1. Navigate to the desired Provider record from the Home drop-down. The Provider screen displays.
2. Click the **Associated Cases** hyperlink from the **Related List Quick Links** section. The **Associated Cases** list view displays.

Note: To create a new Associated Case record, you can click the **New** on the far-right of the screen.

3. Review the following fields: **Case ID, Case Type, Case Subtype, Case Status, Assigned Worker, Originating Case.**

Task 2: Review Case Agreements

1. Navigate to the desired Provider record from the Home drop-down. The Provider screen displays.
2. Click the **Case Agreements** hyperlink from the **Related List Quick Links** section. The **Case Agreements** list view displays.
Note: To create a new Case Agreement record, you can click **New** on the far-right of the screen. **Note:** Case agreements are created through a person record or case. They are specific for individual children or youth. We use case agreements to set up ongoing payment for children and youth. For example, adoption, SPG subsidies, IL allowance, Relative Caregiver stipend.
3. Review the following details: **Case Agreement ID, Case Agreement Type, Agreement Start Date, Agreement End Date, Agreement Status, Approval Action Status, Case ID.**

Task 3: Review Corrective Action Plans

1. Navigate to the desired Provider record from the Home drop-down. The Provider screen displays.
2. Click the **Corrective Action Plans** hyperlink from the **Related List Quick Links** section. The **Corrective Action Plans** list view displays. **Note:** To create a new Corrective Action Plan record, you can click **New** on the far-right of the screen.
3. Review the following details: **Corrective Action Plan Number, Due Date, Corrective Action Plan Title, Corrective Action Plan Status, Program Area Agreement ID.**

Note: The **Corrective Action Plan Status** are *Approved, Denied, Pending, Finalized, and Submitted*. This tracks a Provider's progress on completing their corrective actions.

Task 4: Review Intakes

1. Navigate to the desired Provider record from the Home drop-down. The Provider screen displays.
2. Click the **Intakes** hyperlink from the **Related List Quick Links** section. The **Intakes** list view displays.
3. Review the following details: **Intake ID, Intake First Name, Intake Last Name, Status, Record Type, Report Date/Time, Intake Worker, Disposition Approver.**

Task 5: Review Placements

1. Navigate to the desired Provider record from the Home drop-down. The Provider screen displays.
2. Click the **Placements** hyperlink from the **Related List Quick Links** section. The **Placements** list view displays.
3. Review the following details: **Placement ID, Name, Placement Status, Placement Start Date, Placement End Date, Match?.**

Knowledge Check!

Question 1: From a Provider record, which section is the primary navigation area to open Provider-related record lists like Associated Cases, Intakes, and Placements?

- A. Case header
- B. App Launcher
- C. Global Actions menu
- D. Related List Quick Links

Question 2: In the Associated Cases list view, which field tells you the original case that generated the associated case?

- A. Agreement Status
- B. Intake Worker
- C. Originating Case
- D. Docket Number

Question 3: Which related list is used to review remediation activities including a plan number, due date, and status?

- A. Corrective Action Plans
- B. Placements
- C. Associated Cases
- D. Court Orders

Question 4: In the Corrective Action Plans list view, which field identifies the functional area impacted?

- A. Court County
- B. Case Subtype
- C. Program Area
- D. Disposition Approver

Module 8: Supervisor-Specific Functions

This module walks you through the day-to-day actions a supervisor takes to keep a Provider Application on track. You will start by learning how to navigate and manage the Supervisor dashboard using widgets and queues to locate outstanding items, monitor progress across Provider activities, and spot time-sensitive tasks that need immediate attention. Finally, you will complete the end-to-end workflow for approving key Foster Family Application components, ensuring the application package is ready to advance and that approvals are properly recorded.

After completing this module, you will be able to:

- Navigate and manage the Supervisor dashboard
- Approving key Application Components

Lesson 1: Approve Applications

In this lesson you will also learn how to navigate to the submitted record when the worker submits completed Provider Management Actions for review by selecting Submit for Approval on the Provider Management Action screen. After which you, as the supervisor, will log in to approve, reject, or reassign the request. If you are assigned a Placement Provider Application you will log in as the Network Development Supervisor, for a Vendor/DPA Application you will be logged in as the Contracting Supervisor, for a Licensed Provider Application you will log in as the Licensing Supervisor.

Learning Objectives

- Manage Workload Distribution
- Approve Items from the Items to Approve list
- Reassigning records to other users

Task 1: Manage Team Workload Distribution

1. Log in as the **Supervisor** and click **Home** tab to navigate to the supervisor dashboard.
2. Click the **Items to Approve** on the dashboard. This widget provides a list of items assigned under your scope.

3. Click the **Record ID** hyperlink to navigate to the approval record. **Note:** The type of record and the user who submitted the record are mentioned below the **Record ID** hyperlink.



Process Tip!

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

Task 2: Approve from Items to Approve Section

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

1. Log in as the Supervisor, on the **Home** tab, click the drop-down arrow on the pending item in the **Items to Approve** widget. **Note:** Once you click on the approval record, you can view a summary of **Provider Management Action** related fields.
2. Select *Approve* button from the options available on the drop-down arrow of the record. This displays the **Approve** screen with a text box for comments. **Note:** The other options available are *Reject* and *Reassign*.
3. Enter comments in the text box on the **Approve** screen.
4. Click **Approve**. C-FIRST! approves the selected record and removes it from the **Items to Approve** widget.

Task 3: Conduct Reviews and Approve

On the Provider Management Action screen, once the worker enters any applicable comments, and submits the Application Disposition for approval you will be able to view the details and approve the record.

1. Login as the **Supervisor**. Open the task from the Notifications that has been assigned to you.

2. Click the **Record ID** hyperlink to open the approval request in another screen with **Approval Details**. **Note:** You will be able to view the **Submitted Comments** on the left side of the screen.
3. Click the **Approve** or **Reject** on the right corner of the screen after you have reviewed the details based on your decision.
4. Enter any relevant **Comments** in the text box.
5. Click **Approve** or **Reject** on the pop-up.

Task 4: Reassign Record

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

Task 5: Approve Service Referral Records

Service Referrals used to be called "Case Service Referrals" and were previously not approved by Supervisors. Now, these service referral approvals are routed to Supervisors; these referrals no longer get routed to F & A.

1. Navigate to the record from the **Items to Approve** dashboard or from the **Bell Notification** icon. C-FIRST! displays the **Referral for Service Approval** screen. The right menu displays with the Approve, Reject, and Reassign buttons.

2. To either approve or reject, select the button. A pop-up appears.
3. Enter the approval or rejection comments.
4. Select Approve.
5. The record displays in the **Approval History List View**.

Lesson 2: Access Tableau

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

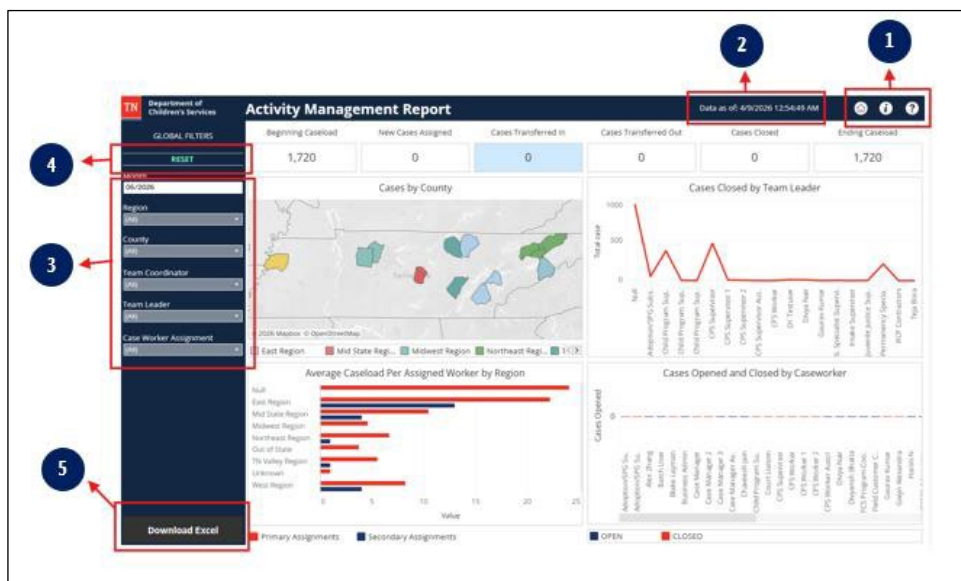


Tableau Homepage

Each Report has the following navigation functionalities:

1. Navigation links to access the Home Page, Info Page, and Help.
2. Indicates the time the report was last refreshed with the Data Warehouse.
3. Filters to slice and dice the data. These filters vary with each report.
4. The **Reset** button helps reset the filters to their default values. The **Reset** button will not change any date filters on the report.
5. The **Download Excel** button enables you to download an Excel version of the report.

We will highlight Filtering and Downloading in our next two tasks.

Learning Objectives

- Accessing Tableau Reports
- Filtering Reports
- Downloading Reports

Task 1: Accessing Tableau Reports

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

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

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

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

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

Task 2: Filtering a Report

Each report has the following filtering functionalities:

1. The user can select any of the filters on the left side of the report to see the values present in the data for that specific field. For example, in the screenshot below we see the following regions that are present in the data for the Intake Report.
2. A user will have the ability to select one or more filters and be able to filter the entire dashboard specific to the select filtering criteria. For example, in the screenshot below, the report is only showing *Midwest Region Intakes* since we have only selected to filter by that.

Intake Report Data as of: 5/5/2026 2:04:53 PM

GLOBAL FILTERS

RESET

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

Region: Midwest Region

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

Download Excel

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

Intake Report Data as of: 5/5/2026 2:04:53 PM

GLOBAL FILTERS

RESET

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

Region: Midwest Region

County: Anderson

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

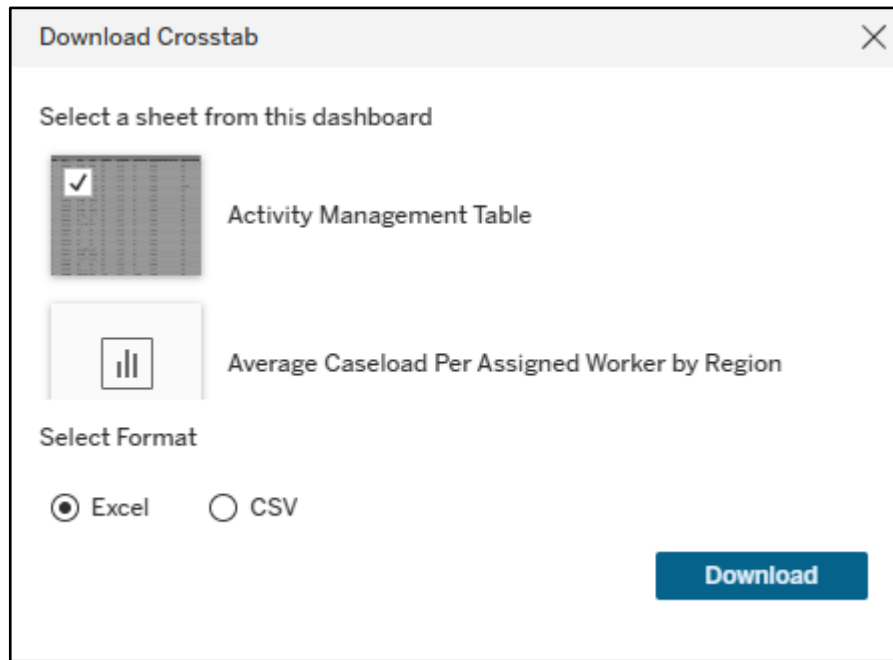
Download Excel

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

Task 3: Downloading a Report

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

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



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

Knowledge Check!

Question 1: What happens to an item after you click Approve successfully from Items to Approve?

- A. It moves to My Workers Tasks
- B. It is converted into a new Notification
- C. It is automatically reassigned to another supervisor
- D. It is removed from the Items to Approve widget

Question 2: If the assigned approver is not the correct person, which action should the supervisor choose?

- A. Reject
- B. Approve
- C. Reassign
- D. Mark Complete

Question 3: In the Reassign flow, which field is used to specify the new approver?

- A. Record Type
- B. Reassign To
- C. Application Type
- D. Assigned Worker

Glossary

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

Term	Definition
Abridged	To abridge means to end a record. It's often used interchangeably with "Created in Error" and is sometimes described as a soft delete; the record remains in C-First! for history/audit purposes, but it is no longer usable for business purposes.
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.
Closed	After the Application has been approved, the status updates to Closed.
Completed	Case status indicating the Investigation worker has completed their work on the Investigation Case.
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.
Inquiry	When someone has raised a question and is awaiting a response or further details.
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.

Term	Definition
NPI	This refers to National Provider Identification, which is unique 10-digit identification number assigned to Provider Organizations.
Pending	Task status indicates that you are actively working on the task.
PREA	This refers to Prison Rape Elimination Act (Risk Assessment).
QRTP	This refers to Qualified Residential Treatment Program.
RET	This refers to the Resource Eligibility Team.
Related List	A section of a record or other detail page that lists items related to that record.
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.
Widget	A small part of an app, like a button, search box that you can see or get information.
Withdrawn	After the application is voluntarily stopped or canceled before the submission.