



C-FIRST! Training

Permanency Specialist Learner Guide

Tennessee Department of Children's Services



Permanency Specialists Course Learner Agenda

Day 1

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Introduction

Welcome to the State of Tennessee Department of Children's Services (DCS) C-FIRST! **Permanency Specialist 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 learnings related to performing case and person searches, updating collaterals, court and legal information, referrals, case documentation, and other case management topics. Before we dive into the details of the course, we are going to recap some general navigation terms and level set on what to expect from today's training.

Let's Dive In

This course covers a Permanency Case in C-FIRST!. The Treatment Case links to the Permanency Case while maintaining the family's Central Record.

Case Scenario: The Rush Family

You have been assigned to the Rush#### family case. The Intake was received from Maple Grove Elementary regarding 10 year old Jaylen Rush####. The Rush#### household came to the attention of the Tennessee Department of Children's Services (DCS) through an investigation into caregiver alcohol misuse and escalating domestic violence. That Investigation has concluded, and the family was referred to Treatment.

A **Treatment Case** now exists in C-FIRST! and a D/N, Unruly Custodial program has been created for the family. The Treatment Case will remain open while Permanency Specialist conducts their activities.

Following the conclusion of the **Treatment Case** proceedings, the situation escalated parental rights for both of Jaylen's parents were involuntarily terminated by the local juvenile court. As a result, 10 year old Jaylen Rush#### has been placed in Full Guardianship.

A **Permanency Case** has been created for Jaylen Rush#### post TPR, with a goal of adoption, or upon the assignment of a Permanency Specialist for **Subsidized Permanent Guardianship (SPG)**. Before you can review the case details, you must log in to C-FIRST! with the correct credentials.

What to Expect

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

1. Navigating the C-FIRST! Homepage, locating cases through list views, and using the Permanency Case dashboard to access related lists and case records.
2. Managing person records on the case, including adding, editing case persons, and viewing plans on a person record.

3. Locating case activities such as child contacts, family visits, and collateral consultations in a case.
4. Documenting custody records and legal statuses and tracking the legal timeline.
5. Developing permanency plans, and service referrals, and submitting them through the supervisor approval workflow.

Your Role

As the case progresses, you will be responsible for maintaining accurate case records, tracking service participation, completing required assessments on schedule, and preparing recommendations for ongoing support. The scenario emphasizes teamwork, accountability, and the importance of clear, timely documentation. You will work closely with both the Rush family and external partners to address risks and support positive outcomes for Jaylen.

Course Objectives

Throughout this course, you will receive hands-on practice in the C-FIRST! training environment using realistic Tennessee family scenarios. You will walk through the full life cycle of a Permanency Case: creating the case and assigning programs, adding case persons, completing plans, documenting ongoing work, and closing the case. By the end of this course, you will be able to navigate the C-FIRST! case management screens, complete the tasks your role requires, and understand how your work connects to the broader child welfare process.

Icons Used Throughout the Course

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

Icon	Description
	System Tip! This icon highlights technical guidance for navigating and using specific features within C-FIRST!.
	Process Tip! This icon provides workflow guidance and important operational notes that help workers apply DCS policies and procedures to C-FIRST!.

Icon	Description
	Win! This icon denotes project developed changes that resulted in the automation of processes or additional streamlining that makes your daily responsibilities more efficient.

Module 1: General Navigation

The module covers the C-FIRST! 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 accessing task notifications, accessing the **Today's Tasks** widget, navigating from a task to its related Case Record, and marking tasks as complete. The module concludes with personalizing the user experience by pinning default list views and adjusting list view settings.

Note: Document Management will be covered in the Case Management training.

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

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

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

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

Learning Objectives

- Log in to the C-FIRST! application using valid credentials
- Identify the components displayed on the Homepage

Task 1: Log in to C-FIRST!

You have been assigned to the Rush#### family case. The Intake was received from Maple Grove Elementary regarding 10-year-old Jaylen Rush####. An Investigation was concluded, and a Treatment Case was opened. Following the Treatment Case, the situation escalated parental rights for both of Jaylen's parents were involuntarily terminated by the local juvenile court.

As a result, 10-year-old Jaylen Rush has been recently placed in Full Guardianship. Before you can review the case details, you must log in to C-FIRST! with the correct credentials.

You have now been assigned as the Permanency Specialist for Jaylen's Permanency Case. Your role is to ensure that Jaylen's placement is stable, that his needs are being met, and that his permanency goals are clearly documented and actively pursued within C-FIRST!.

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

Task 2: Review the Homepage Components

Now that you are logged in, familiarize yourself with the Homepage layout. The **Homepage** displays critical information about your assigned cases, including the Rush family Case.

1. 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 Today's Tasks widget provides access to the following task views: Today, My Tasks, All Overdue, Completed within Last 7 days and Delegated Tasks views. The **View**

All button allows users to view all of the Recently Viewed Task list.

- **Navigation Bar:** This allows the users to switch between different tabs in C-FIRST!.
 - **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 allows users to bookmark their favorite screens for quick access.
 - **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, and 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.
2. The **Home** tab dropdown lists the various tabs available to the logged in user's role. For case management, the **Person** and **Cases** tabs are most used.
 3. Click the **Home** dropdown and select **Person**. The **Person** screen displays.
 4. The **Person Recently Viewed** List View provides comprehensive details about the Person records, including details such as the Name, PID (Person ID), Gender, Date of Birth, Age, Custody Status, Race, and Ethnicity.
 5. There are currently four list views apart from the Recently Viewed list view:
 - All Persons
 - My Contacts
 - Birthdays This Month
 - New This Week
 6. Click the **push pin** icon to set the screen as a default list view. Pinning it will allow this list view to open every time you log in to C-FIRST!.

7. Click the **Home** dropdown and select **Cases**. The **Cases** screen displays.
8. The **Cases Recently Viewed** List View captures comprehensive details about the case records created from various sources including details such as Case ID, Case Name, Case Type, Case Status, Case Open Date, Case Close Date, and County.
9. Additional list views available from the Cases Recently Viewed list view include:
 - All
 - Adoption Cases
 - Investigation
 - My Open Cases
 - Bright Futures Cases
 - My Primary Assigned Cases
 - Court and Legal Queue
 - CWB Queue
 - IC Administrative - ICAMA Cases
 - IC Administrative - ICPC Cases
 - ICPC IC Request Receive
 - Safe Haven Cases
 - Unassigned Incoming ICPC Admin Cases
 - Unassigned Outcoming ICPC Admin Cases
10. Click the **push pin** icon to set the screen as a default list view.
11. On the **Cases** list view screen, users can access the following elements:
 - **Search Bar:** The search bar enables users to search for Intake records, cases and persons within the list displayed.
 - **List View Controls:** This icon allows users to create a new record, and to reset the column width.
 - **Select List Display:** This enables users to choose which custom list view to display.
 - **Refresh:** This allows the users to refresh the listed records on the page.



Process Tip!

Check your **Homepage** at the start of each workday to identify cases requiring immediate attention, such as the Rush Case.

Lesson 2: Navigating the Homepage and Global Menu

Understanding the global menu structure and Homepage components helps you locate required information related to the Treatment Case.

Learning Objectives

- Navigate between tabs using the global menu
- Access Case Records from Homepage components
- Use the Related List Quick Links section to navigate within a case

Task 1: Navigate Using the Global Menu

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

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



System Tip!

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

Task 2: Access Cases from Homepage Components

Your **Homepage** displays several components that provide direct access to your assigned cases. The Rush family Case should display in your notifications since it was assigned to you.

1. On the **Homepage**, locate the **Today's Tasks** component. C-FIRST! displays a list of tasks with due dates matching today's date.
2. Click the **View All** hyperlink below the **Today's Tasks** component. C-FIRST! navigates to the **Tasks** list view displaying all your tasks.
3. Locate the assigned task.
4. Click the task record to open the **Task Details** screen. C-FIRST! displays the task information including the **Related To** field.
5. Click the **Related To** hyperlink on the task to navigate to the details of the task.



System Tip!

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



Process Tip!

Accessing cases through task notifications confirms that you are working on the most time-sensitive items first.

Task 3: Use Related List Quick Links

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

1. On the **Case Details** screen for the case, locate the **Related List Quick Links** section.
2. Click the **Associated Cases** hyperlink in the **Related List Quick Links** section. C-FIRST! displays the list of cases associated with the case.
3. Click the **browser back** button or the **Case name** hyperlink to return to the **Case** screen.

4. Click the **Associated Intakes** hyperlink in the **Related List Quick Links** section. C-FIRST! displays the list of associated Intakes for the case.
5. Click the **browser back** button to return to the **Case** screen.
6. Click the **Case Related Activities** hyperlink in the **Related List Quick Links** section. C-FIRST! displays all the activities related to the case, including details such as Subject, Due Date, Priority, Status, Assigned To, and Related To.
7. Click the **browser back** button or the **Case name** hyperlink to return to the **Case** screen.

Note: You will learn about the other hyperlinks in the **Related List Quick Links** section later in this training.



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.

Lesson 3: Using Search Functions for Cases and Persons

While working on the Rush#### family case, you will need to search for existing Person Records before adding new individuals to the case. C-FIRST! requires an exhaustive search to prevent duplicate records and confirm you have complete history on all case participants.

Learning Objectives

- Perform a person search using multiple search criteria
- Interpret search results and identify matching records
- Switch between different list views

Task 1: Search for an Existing Person

In this example, the person record for Jaylen already exists in C-FIRST!. So, before adding a new person to the case, you must search to determine if they already exist in C-FIRST!.

1. From the **Case** screen for the case, click the **Persons** hyperlink in the **Related List Quick Links** section. C-FIRST! displays the **Persons** screen.
2. Click **Search Case Person**. C-FIRST! opens the **Search for a Person** screen.
3. Click the **Last Name** field and enter *last name*.

4. Click the **First Name** field and enter *first name*.
5. Click the **Date of Birth** field and enter *date of birth*.
6. Click the **Search** button. C-FIRST! performs the search and displays results in the **Search Results** list.
7. Review the search results. If a matching record exists, C-FIRST! displays the person name, date of birth, and PID.

Task 2: Perform a Search That Returns No Results

If your search returns no results, C-FIRST! will display a message indicating no matches were found. You will then need to add them as a new person in C-FIRST!.

Note: If the search returns no matches, C-FIRST! displays the message, "Exhaustive search has found no evidence of any matches in the database."

1. Click **Search Case Person**. C-FIRST! opens the **Search for a Person** screen.
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! performs the search and displays results in the **Search Results** list. **Note:** If the search returns no matches, C-FIRST! displays the message, "Exhaustive search has found no evidence of any matches in the database."
6. Click the **New Person** button. C-FIRST! opens the **New Person** form.
7. Click the **First Name** field and enter *first name*.
8. Click the **Last Name** field and enter *last name####*.
9. Click the **Date of Birth** field and enter *date of birth*.
10. Click the **Gender at Birth** dropdown and select *gender*.
11. Complete all other mandatory fields.
12. Click **Save**. C-FIRST! saves the new Person Record and displays a confirmation message.
13. Click the **Generate PID** button. C-FIRST! assigns a unique Person Identifier.

Task 3: Switch Between List Views

C-FIRST! provides multiple pre-configured list views to help you organize your work. Understanding these views helps you access the information you need.

1. Click the **Cases** tab in the navigation bar. C-FIRST! displays the **Cases** list view.
2. Click the **dropdown arrow** icon next to the current view name. C-FIRST! displays the list of available views.
3. Select **All** from the dropdown. C-FIRST! displays all Case Records in C-FIRST! including:
 - Case ID
 - Case Name
 - Case Type
 - Case Status
 - Case Open Date
 - Case Close Date
 - County
4. Click the **dropdown arrow** icon and select *Treatment Cases*.
5. Click the **dropdown arrow** and select *Recently Viewed*.
6. Click the **Pin** icon (push pin) next to your preferred view. C-FIRST! sets this view as your default when accessing the **Cases** tab.

Lesson 4: Understanding Notifications

C-FIRST! uses tasks and notifications to alert you when action is required on your cases. For the Rush#### family Case, you will receive notifications when the case is assigned, when approvals are needed, and when deadlines approach.

Learning Objectives

- Access task notifications
- Switch between task views
- Navigate from a task to its related case
- Mark tasks as complete
- Review approval notifications

Task 1: Access Your Task Notifications

When the Statewide Specialized Support Services Supervisor assigned the Rush#### family Case to you, C-FIRST! created a task notification. You must access this notification to begin working on the case.

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 **View All** below the **Today's Tasks** component. C-FIRST! navigates to the **Tasks** list view.
4. Review the **Today's Tasks** list view and locate the task assigned to you.
5. Alternatively, click the **My Tasks** list view from the Tasks recently viewed dropdown arrow.



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: Switch Between Task Views

C-FIRST! provides multiple task views to help you organize your workload. You can view all tasks, open tasks, overdue tasks, or completed tasks depending on your needs.

1. On the **Tasks** list view, click the **dropdown arrow** next to the current view name.
2. Click the **dropdown arrow** and select *All Tasks*.
3. Click the **dropdown arrow** and select *Open Tasks*.
4. Click the **dropdown arrow** and select *Overdue Tasks*.
5. Click the **dropdown arrow** and select *Completed Tasks*.
6. Click the **dropdown arrow** and select *Today's Tasks*.
7. Click the **Select list display** button (table icon) to change how tasks are displayed.



Process Tip!

Check the **Overdue Tasks** daily to confirm that no required deadlines have been missed.

Task 3: Navigate from Task to Related Screen

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

1. On the **Tasks** list view, click the required **Subject** for the Rush#### family Case. C-FIRST! opens the **Task** screen.
2. Locate the **Related To** field.

3. Click the **Related To** hyperlink to navigate to the appropriate details screen.
4. Review the case information to understand what action is required.
5. Click the **browser back** button to return to the **Task Details** screen. C-FIRST! displays the task record.

Task 4: 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 a record 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 5: Review Approval Notifications

When you submit various case related items 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. Look for tasks like *"Supervisor assigned you a task. Please review the record and Submit for Approval."*
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.



System Tip!

Supervisors can also go to the Homepage and click the **Items to Approve** widget to access and approve plans and other items.

Lesson 5: Managing Your User Profile and Preferences

Customizing your C-FIRST! profile and preferences helps you work more efficiently on cases like the Rush#### family Case. Setting default views, pinning frequently used list views, and understanding your profile settings confirms C-FIRST! is configured to support your workflow.

Learning Objectives

- Access and review your user profile information
- Set default list views using the pin feature
- Access the Today's Tasks widget

Task 1: Pin Default List Views

Pinning a list view sets it as your default when you access that tab. For cases, pinning the **My Primary Assigned Cases** view means you see your active Caseload first.

1. Click the **Cases** tab in the navigation bar. C-FIRST! displays the **Cases** list view.
2. Click the **dropdown arrow** next to the current view name and select *My Primary Assigned Cases*. C-FIRST! displays cases assigned to you with status *Open* or *Completed*.
3. Locate the **push pin** icon next to the **View** dropdown and click it. C-FIRST! sets **My Primary Assigned Cases** as your default view for the **Cases** tab.
4. Click the **Home** tab in the navigation bar. C-FIRST! displays the **My Primary Assigned Cases** view by default.



Process Tip!

Pin the view you use most frequently. To view assigned cases, **My Primary Assigned Cases** is typically the most useful default view.

Task 2: 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 case information efficiently.

1. On the **Cases** list view, click the **List View Controls** icon (gear icon) on the toolbar. C-FIRST! displays list view settings options.
2. Review available settings for column display and list behavior.
3. Click the **Select list display** icon (table icon) to switch between display formats. C-FIRST! offers alternative ways to view the list data.
4. Click the **Refresh** icon (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** icon after making changes to Case Records to confirm the list view displays the most current data.

Task 3: Navigate to the Today's Tasks List View

You need to navigate to the task list in C-FIRST! to view and manage tasks related to the Rush#### family Case. From the Homepage, you will access the Today's Tasks dashboard to see all available tasks.

1. Click the **Home** tab. C-FIRST! displays the Homepage with available widgets and their associated reports.
2. Locate the **Today's Tasks** dashboard on the Homepage.
3. Click **View All** on the **Today's Tasks** dashboard. C-FIRST! displays the **Today's Tasks** List View with all tasks assigned to you.



System Tip!

The **Today's Tasks** List View displays all tasks created for and assigned to you. From this view, you can create new tasks, edit existing tasks, or mark tasks as complete.

Knowledge Check!

Question 1: What is the first step you should take when you receive a notification that a new case has been assigned to you?

- A. Mark the task as complete
- B. Click the Related To hyperlink to navigate to the case
- C. Create a new case contact
- D. Submit the case for approval

Question 2: Which button allows you to set a list view as your default when accessing a tab?

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

Question 3: True or False: Once you have marked a task complete and the Mark Complete button is replaced by a Completed button, you can no longer change the status.

- A. True
- B. False

Module 2: Case & Person Management

Person Management in C-FIRST! centralizes all individual records associated with a given case. The processes of adding persons, documenting their relationships, and recording visitation waivers are conducted within the Case Person record. Maintaining accurate person records is essential for court documentation, effective service planning, and appropriate case assignment throughout the case lifecycle.

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

When a Person record is linked to a case, a **Case Person** record is created in C-FIRST!. When a worker selects **Search Case Person**, locates the individual, and clicks **Associate**, the system generates a new Case Person record. This record captures case-specific details not maintained at the Person level, including:

- Individual's Role on the case (e.g., Child/Youth, Parent), Case Person Status (Active/Inactive)
- County Venue
- Custody
- Preferences for Hearing and Meeting Alerts
- Visitation Waiver status
- Other contextual fields

Each Case Person entry also maintains its own Person Involvement History related list, documenting periods of activity or inactivity within the case.

The key distinction is that a single Person record may be linked as a Case Person across multiple cases simultaneously, potentially fulfilling different roles or statuses. The Person record identifies the individual, while the Case Person record specifies their involvement and capacity within a particular case.

Example:

Sarah Williams is a mother involved with DCS. She has one Person record in C-FIRST! that stores her name, date of birth, home address, phone number, and demographics. That Person record exists once in the system and never duplicates.

Now suppose DCS opens a Treatment case for her son, David. A case manager searches for Sarah, clicks Associate, and the system creates a Case Person record on that Treatment Case. On that Case Person record, the worker sets her Role to *Parent*, her Case Person Status to *Active*, and her **County Venue** to the appropriate county.

Six months later, DCS opens a separate Permanency Case for David. Sarah gets associated with that case, too. The system creates a second Case Person record, this time on the Permanency Case. On this one her Role might still be *Parent*, but her status, alerts, and involvement history are tracked independently from the Treatment Case.

Now Sarah has:

- One Person record (her identity, contact info, demographics)
- Two Case Person records (one per case, each with its own role, status, county venue, alert preferences, and involvement history)

If Sarah moves to a new address, the case manager updates her Person record once, and that updated address is available everywhere. But if she becomes inactive on the Treatment Case while remaining active on the Permanency Case, that change only happens on the Treatment Case Person record. The Permanency Case Person record stays Active.

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

- Navigate between Related Lists in a Treatment and Permanency Case
- Link Associated Cases and Intakes
- Manage Persons on a Treatment Case

Lesson 1: Overview of a Treatment Case

A Treatment Case captures the work done by DCS to assist children and families in finding stability and permanency. Activities such as Child and Family Team Meeting (CFTMs), Plans, Case Conferences, and Case Documentation can be documented on a Treatment Case.

A Treatment Case can be accessed from the **Cases** tab or by navigating to the Person Record for whom the Treatment services are to be provided. Based on our scenario, there is a Treatment Case already created for the Rush#### family. A Treatment Case is created by a case manager.

Note: The steps for creating new Custodial and Non-Custodial Permanency Plans were covered in the Case Management training. This is the overview of the case record for anyone who hasn't attended training yet.

Learning Objectives:

- Locate the Program Areas and Assignees
- Locate and Review Placements
- Review Permanency Plans
- Review the Case Documentation
- Review Child and Family Team Meeting Records (CFTMs)

Task 1: Basic Navigation of the Treatment Case

1. Click the **Home** dropdown and select **Cases**.
The **Cases Recently Viewed** list view captures comprehensive details about the Case Records created from various sources, including details such as Case ID, Case Name, Case Type, Case Status, Case Open Date, Case Close Date, and County. There are currently the following list views in addition to the Recently Viewed list view:
 - All
 - Adoption Cases
 - Investigation

- My Open Cases
 - Bright Futures Cases
 - My Primary Assigned Cases
 - Court and Legal Queue
 - CWB Queue
 - IC Administrative - ICAMA Cases
 - IC Administrative - ICPC Cases
 - ICPC IC Request Receive
 - Safe Haven Cases
 - Unassigned Incoming ICPC Admin Cases
 - Unassigned outgoing ICPC Admin Cases
2. Click the **Push pin** icon to set the screen as a default list view. On the **Cases** list view screen, users can access the following elements:
- **Search Bar:** The search bar enables users to search for Intake Records, Cases and Persons within the list displayed.
 - **List View Controls:** This icon allows users to create a new record, and to reset the column width.
 - **Select List Display:** There are three list displays, Table, Kanban, and Split View. This enables users to choose which custom list view to display.
 - **Refresh:** This allows the users to refresh the listed Records on the screen.
3. Click the **hyperlink** in the **Case ID** column to open a Case record. The **Case** screen has the following features:
- **Case Status:** This displays the status of the case. The Case can be in any of the following statuses:
 - Abridged
 - Closed
 - Completed
 - Open
 - **Case Type:** This displays the type of the case. The Case Type is Treatment Case.
 - **Assigned Worker:** This displays the name of the assigned Case Worker/Manager, etc.
 - **Related Lists Quick Links:** This section contains hyperlinks that let users view and access information related to the case like Permanency Activities, Case

Documentation, Court Order & Hearings, Case History, etc.



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

- **Case Information:** This section displays the **Case Details** and the **System Information** sections. It includes details like the Case ID, Case Open Date, Restricted, Case Closure Reason, Created By, etc.
- **Case Summary:** This section displays an AI-generated Case Summary at the top of the screen. The summary highlights the circumstances that led to the creation of the case and outlines the recent developments affecting the family and child. The screen displays details about Provider and Person Location, Case Persons, Court Details, Assessments and Placements.
- **Timeline:** This section displays interactive timeline chart highlighting significant Case Related Activities, displaying them in chronological order. Click any of the events to open it in a separate screen to view details of the event.
- **Attachments:** This section displays all the files that are attached to the case record. Users can Download Files, Basic File Upload, Advanced File Upload, Merge Files and Search within the listed attachments.
- **Case Person Timeline:** The section displays a generated visual timeline about the person and Theme. The interactive chart has clickable data points that open a panel to the right with detailed information. Users can filter and customize the timeline chart using two dropdown fields:
 - **Name:** Select from a list of available Case Persons.
 - **Theme:** Choose from predefined themes relevant to child welfare analysis. There are various themes for the user to select like Health

and Well-Being, Safety and Protection, Stability and Permanency, Behavioral and Social Development, Family Dynamics, Services and Support, Crisis and Urgency, etc.

Task 2: Locate the Program Areas and Assignees

You need to access the Program record on the Jaylen#### Treatment Case to review the program records associated with the children.

4. Navigate to the Jaylen#### Treatment Case from the **Cases** tab on the Homepage.
5. Scroll to the **Related List Quick Links** section on the case.
6. Click the **Programs** hyperlink. C-FIRST! displays the **Programs** list view.
7. Review the columns in the **Programs** list view: **Program ID**, **Case Person Name**, **Program Type**, **Program Status**, **Program Start Date**, and **Program End Date**.
8. Click the hyperlink in the **Program ID** column for the desired record. C-FIRST! displays the **Programs** detail screen.
9. Review the fields displayed on the **Programs** detail screen, including **Program ID**, **Case Person**, **Child Name**, **Program Type**, **Program Status**, and **Program Start Date**.
10. Review the **Assignee** field, which displays the user assigned to the program record.
11. Review the **Referral Source** field, which captures the source of the program referral.
12. Review the **Supervisor** field, which C-FIRST! populates based on the assigned supervisor of the user.



System Tip!

- The **Programs** list view displays all program records associated with the Treatment Case. Click **New** to create a new program record or click an existing **Program ID** hyperlink to view the record details.
- C-FIRST! automatically populates the **Supervisor** field based on the user selected in the **Assignee** field. Users can edit the **Supervisor** field if needed.



Process Tip!

C-FIRST! defaults the **Program Status** to *Pending* when a new program record is created. Users update the status as the program progresses through the workflow.

Task 3: Locate and Review Placements

You need to access the Custodial Placements list for the Rush#### family Treatment Case to review placement records.

1. Navigate to the Rush#### Treatment Case record.
2. Locate the **Related List Quick Links** section on the Case record.
3. Click the **Placements** hyperlink from the **Related List Quick Links** section. C-FIRST! displays the **Custodial Placements** list view.
4. Review the columns displayed in the **Custodial Placements** list view: **Placement ID, Record Type, Client Name, Last Name/Organization Name, Placement Status, Placement Start Date, Placement End Date, and Match.**



System Tip!

From the **Custodial Placements** list view accessed through a Case record, you can only create a Trial Home Visit or Primary Placement record. Secondary Placement records are created from a Primary Placement record. To create a Non-Custodial Placement, navigate to the Person Type record.

Task 4: Review Permanency Plans

You need to review the Permanency Plans associated with the Rush#### family Case.

1. Navigate to the Rush#### family Case record.
2. Locate the **Related List Quick Links** section on the Case record.
3. Click the **Plans** hyperlink from the **Related List Quick Links** section. C-FIRST! scrolls to the **Plans** Related List.

4. Review the **Plans** List View. C-FIRST! displays columns for **Plan ID, Record Type, Plan Status, Plan Date,** and **Ratified.**
5. Locate the desired Plan record in the list.
6. Click the hyperlink in the **Plan ID** column for the desired Plan. C-FIRST! displays the Plan detail screen.



Process Tip!

Plans can be *Custodial* or *Non-Custodial*. The **Record Type** column on the **Plans** List View identifies the type for each Plan.

Task 5: Review the Case Documentation

Now, you need to locate existing Case Documentation records on the Rush#### Treatment Case.

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



System Tip!

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

Task 6: Review Child and Family Team Meeting Records (CFTMs)

You will navigate to the Rush#### Treatment Case record and access the Child and Family Team Meeting list view.

1. Navigate to the Case record for the Rush#### family.
2. Scroll to the **Related List Quick Links** section on the Case record.
3. Click the **Child and Family Team Meeting** hyperlink. C-FIRST! displays the **Child and Family Team Meetings** list view.
4. Review the columns displayed on the **Child and Family Team Meetings** list view: **Child and Family Team Meeting ID, Child and Family Team Meeting Status, Created Date, Completed Date, Scheduled Date, and Child and Family Team Meeting Type.**
5. Locate the **New** button on the **Child and Family Team Meetings** list view.



System Tip!

Click the hyperlink in the **Child and Family Team Meeting ID** column to open an existing CFTM record for review.

Task 7: Access the Diligent Search List View from a Case

You are now working on the Treatment Case for the Rush#### family. Jaylen Rush#### and Aaliyah Rush#### have been placed with their maternal grandmother, Dorothy Rush####. You need to review the Diligent Search records associated with this Case.

1. Navigate to the Rush#### family Case Record.
2. Locate the **Related List Quick Links** section on the case.
3. Click the **Diligent Search** hyperlink. C-FIRST! displays the **Diligent Search** list view.
4. Review the columns on the **Diligent Search** list view, including **Diligent Search ID, Child/Youth, Diligent Search Date, Diligent Search Status, Diligent Search Sub-Type, and Method.**



System Tip!

Click the hyperlink in the **Diligent Search ID** column to open an existing record and view its details on the **Diligent Search** detail screen.

Lesson 2: Case Related Lists

Case Related Activities provide a consolidated view of all tasks associated with a Case record. Users can review, create, and update activities to track due dates, assignments, and task completion across the case.

Learning Objectives

- Link Related Cases together
- Associate Intakes to Cases
- Navigate and view the Case Related Activities List View from a Case record

Task 1: Linking Associated Cases

1. Click the **Home** dropdown from the Homepage and select **Cases**. The **Cases Recently Viewed** screen displays.
2. Click the relevant type of case from the **Case ID** column. The **Case** screen displays.
3. Click the **Associated Cases** hyperlink from the **Related List Quick Links** section and the **Associated Cases** Related List on the case captures all the associated case records that are associated to the child/family in the case.
4. Click **New** to create a new Associated Case record. The **New Associated Case** pop-up displays.
5. Click the **Associated Case ID** field and enter the number of the case to be associated.
6. The **Case ID** field is auto populated.
7. Click **Save** or **Save & New** to save this record and create another one. The cases are associated.

Task 2: Linking Associated Intakes Together

1. Click the **Home** dropdown from the Homepage and select **Cases**. The **Cases Recently Viewed** screen displays.
2. Click the relevant case from the **Case ID** column. The **Case** screen displays.
3. Click the **Associated Intakes** hyperlink from the **Related List Quick Links** section. The **Associated Intakes** screen displays. The **Associated Intakes** List View displays linked intakes (when an intake results in an investigation which results in a Treatment Case). The screen includes details such as Intake ID,

Report Date/Time, Intake First Name, Intake Last Name, Incident Date, Intake Worker, Disposition Supervisor, Intake Status, and Date Report Completed.

4. Click **New** to associate a new intake to the case. The **New Association: Case Associated Intake** pop-up displays.
5. Click the **Intake ID** field and enter the **Intake ID** to be associated with the case.
6. Click **Save** or **Save & New** to save this record and create another one. The case and intakes are associated.

Task 3: Viewing Case Related Activities

Case Related Activities is a consolidated list of all tasks that are associated with a case. Users can view each task and who the task is assigned to, all in one place, without having to open each child record separately.

1. Click the **Home** dropdown from the Homepage and select **Cases**. The **Cases Recently Viewed** screen displays.
2. Click the relevant Case from the **Case ID** column. The **Case** screen displays.
3. Click the **Case Related Activities** hyperlink from the **Related List Quick Links** section and the **Case Related Activities** screen displays. The Case Related Activities List View includes details such as Subject, Due Date, Priority, Status, Assigned To, and Related To.
4. Click the hyperlink in the **Subject** column to view the related activity details.

Lesson 3: Managing Persons in a Treatment Case

You can associate multiple persons with a case, track their roles, and document information.

Learning Objectives

- Add a new person to a case using the Search Case Person button
- Complete required and optional fields on the Case Persons detail screen
- View Plans from a Person Record

Task 1: Navigate to the Person Record

A Person record is a persistent unique identifier, that does not change regardless of the number of intakes, cases, or provider records associated with the individual.

1. From the Homepage, open the **Permanency Case** for the Rush#### family. C-FIRST! redirects you to the Case Details screen.
2. Click **Persons** from the **Related List Quick Links** section and click the **Case Person ID** hyperlink to view the Case Person record.
3. Click the **Person** hyperlink in the **Details** section to view the Person details specific to that individual.

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. <i>Jane Doe's PID 12345 stays 12345 across all records, forever.</i>				
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

Task 2: Create a Custody Record for a Child

You need to create a new Custody record to document this custody episode for Jaylen Rush####.

1. Click **New** on the **Custody** related list.
2. Click **Next**. C-FIRST! displays the new **Custody** record pop-up.
3. Review the **Client Name** field to confirm C-FIRST! populated the value from the Case Person record.
4. Click the **Custody Status** dropdown. Select *Active*.
5. Click the **Custody Type** dropdown. Select the applicable custody type for the scenario.
6. Review the **VPA Custody?** field to confirm C-FIRST! defaulted the value to *No*.
7. Enter the start date of the custody episode in the **Start Date** field.
8. Click the **Caregiver 1 Name** field and select *Dorothy Rush####*.
9. Review the **PID** and **Gender** fields for Caregiver 1 to confirm C-FIRST! populated these values from the Person record.
10. Click the **Relationship** dropdown for Caregiver 1. Select the applicable relationship to the child.
11. Click the **Commitment County** dropdown. Select the applicable county.
12. Click the **Reason for Custody** multi-select box. Select all applicable reasons for the custody episode.
13. Click the **Family Structure** dropdown. Select the applicable family structure value.
14. Click the **Environment at Removal** dropdown. Select the applicable environment at removal value.
15. Click **Save**. C-FIRST! saves the record and displays the **Custody** detail screen.



Process Tip!

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



System Tip!

- **Start Date** is required when the **Custody Status** is *Active*. C-FIRST! also validates that the Start Date does not overlap with the Start Date and End Date timeframe of another Custody record for the same child.
- **Caregiver 1 Name** and the **Caregiver 1 Relationship** fields are both required when the **Custody Status** is *Active*.
Caregiver 2 Name and **Caregiver 2 Relationship** are optional.

Task 3: Add a New Person to a Case

Dorothy Rush####, the grandmother, has agreed to serve as the placement resource for Jaylen Rush####. You need to add Dorothy Rush#### as a Case Person on the open Treatment Case.

1. Navigate to the desired Case record in C-FIRST!.
2. Click the **Persons** related list. C-FIRST! displays the **Case Persons** list view.
3. Review the list view columns, which include **Case Person ID**, **Role**, **Last Name**, **First Name**, **Birthday**, **PID**, and **Case Person Status**.
4. Click **Search Case Person**. C-FIRST! displays the **Person Search** screen.
5. Enter the search criteria for the desired person in the available search fields.
6. Click **Search**. C-FIRST! displays matching results.
7. Click the **dropdown arrow** at the end of the row.
8. Select **Associate**. The person is now associated to the case record.



System Tip!

Click the hyperlink in the **Case Person ID** column to open an existing Case Person record for review or editing.

Task 4: Complete Case Person Detail Fields

After selecting Dorothy Rush#### from the Person Search results, you need to complete her Case Person details. Dorothy Rush#### is the maternal grandmother and will receive hearing and meeting alerts for the case.

1. Review the **Case Person ID** field. C-FIRST! auto-generates this value.
2. Review the **Person** field and **Person PID** field. C-FIRST! populates these from the Person record.
3. Click the **Case Person Status** dropdown. Select *Active*.
4. Click the **Role** dropdown. Select the applicable role for the Case Person.
5. Review the **Safe at Home Person?** field. C-FIRST! populates this value from the Person Type Person record.
6. Review the **Active Domestic Violence Concern?** field. C-FIRST! populates this value from the Person Type Person record.
7. Click the **County of Venue** dropdown. Select the county where the case venue is located.
8. Click the **Receive Hearing and Meeting Alerts?** dropdown. Select *Yes*.
9. Review the **Visitation Waiver?** field. C-FIRST! defaults this value to *No*.
10. Click the **LifeSkills (IL) Assessment Exempt?** dropdown. Select the applicable value.
11. Review the **Seal Case Person? (Adoption)** field. C-FIRST! defaults this value to *No*.
12. Click the **Relation** dropdown. Select the applicable relation for the Case Person.
13. Review the **Case ID** field. C-FIRST! populates this value from the Case record.
14. Click **Save**. C-FIRST! saves the record and displays the **Case Persons** list view.



System Tip!

C-FIRST! auto-populates several fields on the Case Persons detail screen, including **Case Person ID**, **Person PID**, **Safe at**

Home Person?, **Active Domestic Violence Concern?**, and **Case ID**. These fields are not editable by the user.



Process Tip!

When you select *Yes* for **LifeSkills (IL) Assessment Exempt?**, C-FIRST! automatically updates any worklisted or in-progress LifeSkills 2.0 (IL) Assessment records for the person to a status of *Abridged*.

Task 5: View Plans on a Person Record

You need to view all historical Plans for Jaylen Rush#### directly from his Person record to see plans across time.

1. Click the **Persons** tab. C-FIRST! displays the **Persons** list view.
2. Click the desired **Person** record for Jaylen Rush####. C-FIRST! displays the Person record.
3. Locate the **Related List Quick Links** section on the Person record.
4. Click the **Person Type** hyperlink from the **Related List Quick Links** section. C-FIRST! scrolls to the **Person Type** Related List.
5. Click an existing Client record. C-FIRST! displays the Person Type Person detail screen.
6. Locate the **Related List Quick Links** section on the Person Type Person record.
7. Click the **Plans** hyperlink from the **Related List Quick Links** section. C-FIRST! scrolls to the **Plans** Related List.
8. Review the **Plans** List View. C-FIRST! displays columns for **Plan ID**, **Record Type**, **Plan Status**, **Plan Date**, and **Ratified**.
9. Click the hyperlink in the **Plan ID** column to open a Plan record. C-FIRST! displays the **Plan** detail screen.



Process Tip!

When a Person is a Plan Participant on a Plan, the Plan Record and its details automatically populate in the **Plans** List View on

the Person Record. This allows you to view all current and historical Plans for a single Person.



System Tip!

Select the Person Record to access the **Plans Related List**. Plans are associated to the Person through their Person Type Record.

You can navigate to the associated Provider record for Jaylen Rush#### directly from his Person record.

10. Click the **Persons** tab. C-FIRST! displays the **Persons** list view.
11. Click the desired **Person** record for Jaylen Rush####. C-FIRST! displays the Person record.
12. Locate the **Related List Quick Links** section on the Person record.
13. Click the **Provider Person Association** hyperlink from the **Related List Quick Links** section. The Provider Person Association list view displays the list of Provider Person Association created for the Person.
14. Review the Account Name, Date Effective, Date Ended, Status of the Provider associated with Jaylen Rush####.
15. Click the **Account Name** hyperlink to open the Provider record.

Knowledge Check!

Question 1: From the Custodial Placements list view accessed through a Case record, which records can a user create?

- A. Secondary Placement and Trial Home Visit
- B. Primary Placement and Secondary Placement
- C. Trial Home Visit and Primary Placement
- D. Any placement type

Question 2: What is the primary purpose of the Case Related Activities list view on a Case record?

- A. To create new treatment cases for a family

- B. To view all tasks related to the case, including assignment and due date details
- C. To link one case to multiple workers
- D. To display only completed activities for the case

Question 3: How do you add an existing person to a Treatment Case in C-FIRST!?

- A. Click New in the Persons related list and manually enter all person details
- B. Click Search Case Person, search for the person, and select Associate
- C. Open the Person record and click Add to Case
- D. Create a new Provider Person Association

Question 4: Which statement about the Case Person detail screen is correct?

- A. Users must manually enter the Case Person ID and Case ID
- B. The Case ID field can be edited if the wrong case was selected
- C. Several fields, including Case Person ID, Person PID, and Case ID, are auto populated and not editable
- D. The Role field is always auto populated from the Person record

Module 3: Permanency Case

Before beginning a Permanency Case, we reviewed the key steps in the Treatment Case. This included creating the Treatment Case, establishing the D/N, Unruly Custodial Program record, and creating the Placement Record. We noted that the Treatment Case remains open until an Adoption or Guardianship Case is created, with supporting records such as CFTM, Plan, Case Conference, Case Documentation, and Service Referrals being completed as needed.

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

- Create Permanency Case
- Create Individual Recruitment Plans (IRP)

Lesson 1: Creating a Permanency Case

Once the TPR is granted, a Permanency Specialist Supervisor will create a Permanency Case and assign it to the Permanency Specialist.

Learning Objectives:

- Create a Permanency Case Referral
- Create a Permanency Case

Task 1: Create a Permanency Case Referral

The Permanency Case Referral record is used to establish the Permanency Case and capture the related processes of referring a child's case to child welfare professionals, legal representatives, and other stakeholders. This is the first step in a Treatment Case when reunification with the parents is not possible, and the child will move forward with either Adoption or Guardianship.

1. Log in as the Permanency Specialist Supervisor from the Homepage.
2. Click the **Home** dropdown and select **Cases**. The **Recently Viewed Cases** screen displays.
3. Click the required **Case ID**. The **Case** screen displays.
4. Click the **Permanency Activities** hyperlink from the **Related List Quick Links** section. The **Permanency Activities** screen displays. The Permanency Activities List View displays the list of Permanency Activities created for the case, including details

such as Activity ID, Case Person, Case Manager, Referral Type, Referral Status, Reason for Case, and Permanency Specialist. To view an existing record, click the hyperlink in the Referral ID column.

5. Click **New** to create a new permanency activity record. The **New Permanency Activities** pop-up displays.
6. Select from the following record types:
 - Adoption Case Activity
 - Guardianship Referral
 - Permanency Case Referral
7. Click the **Permanency Case Referral** radio button and click **Next** to proceed to add the case referral details. The **New Permanency Activities: Permanency Case Referral** pop-up displays.

Note: A Permanency Case cannot be created manually and is created on completion of the Permanency Case Referral.



System Tip!

- The **Case Person ID** and **Create New Permanency Case?** fields are mandatory fields. C-FIRST! displays an error and prevents the user from proceeding if the fields are left blank.
- The **Referral Type** field defaults to *Permanency Case Referral*.
- The **Abridge Reason** and **Abridge Notes** fields display only when users select the *Abridged* option from the **Referral Status** dropdown.

8. Click the **Case Person ID** field and enter the Case Person ID.



System Tip!

If the Case Person is not found in C-FIRST!, add a new Case Person using the **Add Person** option.

9. Click the **Permanency Specialist Supervisor** field and enter the name of the Supervisor of the assigned Permanency Specialist.

10. The default option in the **Referral Status** dropdown is *Pending*.
The other options in the dropdown are:
 - Abridged
 - Completed
 - Pending
 - Worklisted
11. Click the **Create New Permanency Case?** dropdown and select *Yes* to indicate if the creation of a new Permanency Case is required.
12. Click the **Reason for Case** dropdown and select an option to indicate the reason for the creation of a Permanency Case. The options in the dropdown are:
 - Adoption
 - Guardianship
 - PPLA
13. Click **Save**. A new Permanency record for adoption is created.

Lesson 2: Individual Recruitment Plans

The Individual Recruitment Plan (IRP) captures the steps taken by Permanency Specialists to find a permanent family for a child in full guardianship.

Learning Objectives:

- Create an IRP record
- Add the Resources Under Consideration
- Add details for the Selection Committee
- Add Attendees for the Selection Committee

Task 1: Create an IRP record

Let's see how to create an IRP record to document the plan and monitor plan progress for Jaylen### who needs long-term permanency resources.

1. Log in as a Permanency Specialist.
2. From the Homepage, click the **Home** dropdown and select **Cases**. The **Cases** screen displays.
3. Click the required Case ID. The **Case** screen displays.

4. Click the **Permanency Activities** hyperlink from the **Related List Quick Links** section. The **Permanency Activities** screen displays.
5. Click the **Activity ID** record with **Referral Type** as *Adoption Case Activity*. The record displays.
6. From the **Related List Quick Links** section, click the **Individual Recruitment Plans** hyperlink. The **Individual Recruitment Plan** screen displays.
7. Click **New** to add a new record. The **New Plan** pop-up displays.
8. Select the **Individual Recruitment Plan** radio button and click **Next**. The **New Plan: Individual Recruitment Plan** pop-up displays.
9. Click the **Is the Child Refusing Recruitment?** dropdown and select if the child is refusing the recruitment plan.
10. Click the **Recruitment Limited to Geographic Area?** dropdown and select an option. If you select Yes, then the **Geographic Limit Explanation** field is mandatory.
11. Click the **Geographic Limit Explanation** field and enter the area within which the recruitment is being planned.
12. Click the **Initial Recruitment Plan Meeting Summary** field and enter the summary notes from the IRP meeting.
13. Click the **Youth Served Through Contract Provider?** dropdown and select if the youth is served through a provider under a contract.
14. The default option in the **Initial Review Status** dropdown is *Pending*. The options in the dropdown are:
 - Abridged
 - Completed
 - Pending
 - Worklisted
15. Click **Save**. The record is successfully saved.
16. Click the **Pencil** icon to modify the IRP record, if required.

Task 2: Related List: Resources Under Consideration

1. From the Homepage, click the **Home** dropdown and select **Cases**. The **Cases** screen displays.
2. Click the required Case ID. The **Case** screen displays.

3. Click the **Permanency Activities** hyperlink from the **Related List Quick Links** section. The **Permanency Activities** screen displays.
4. Click the **Activity ID** record with **Referral Type** as *Adoption Case Activity*. The record displays.
5. From the **Related List Quick Links** section, click the **Resources Under Consideration** hyperlink. The **Resources Under Consideration** screen displays.
6. Click **New Resource Under Consideration** to add a new record. The **New Person Involved: Resource Under Consideration Adoption Case Activity** pop-up displays.
7. In the **Case Person ID** field, enter the required Case Person ID.
8. Select the **Type** of resource that is under consideration. The **Type** options in the dropdown are:
 - Contract Provider
 - Foster Parent
 - ICPC
 - Kinship
9. Click **Save** to save the record. The **Person Involved** screen displays.

Task 3: Related List: Selection Committees

1. From the Homepage, click the **Home** dropdown and select **Cases**. The **Cases** screen displays.
2. Click the required Case ID. The **Case** screen displays.
3. Click the **Permanency Activities** hyperlink from the **Related List Quick Links** section. The **Permanency Activities** screen displays.
4. Click the **Activity ID** record of the record with **Referral Type** as *Adoption Case Activity*. The record displays.
5. From the **Related List Quick Links** section, click the **Selection Committees** hyperlink. The **Selection Committees** screen displays.
6. Click **New** to add a new record. The **New Selection Committee: Adoption Selection Committee** pop-up displays.



System Tip!

- The **Committee Meeting Date** and **Review Status** fields are mandatory fields. C-FIRST! displays an error if left blank and prevents the user from proceeding.
- The **Abridge Reason** and **Abridge Notes** fields display if users select the *Abridged* option from the **Review Status** field.
- The **Record Type** field defaults to *Adoption Selection Committee*.

7. Enter the meeting date in the **Committee Meeting Date** field.



System Tip!

The **Committee Meeting Date** cannot be a date in the future. C-FIRST! displays an error if a future date is entered.

8. Enter the required recommendation of the committee in the **Recommendation** field.



System Tip!

The **Recommendation** field becomes mandatory if the *Completed* option is selected in the **Review Status** field.

9. The default option in the **Review Status** dropdown is *Pending*.

10. Scroll down to the **Decision** section.

11. Select the **Decision** from the dropdown. The options in the dropdown are:

- Deferred
- Denied
- Home Selected
- Request Withdrawn

12. Click the **Outcome Details** field and enter the details of the committee. In this example, type *Decision to be arrived at a later meeting*.

13. Click **Save** to save the record. The **Selection Committee** screen displays.

14. The **Selection Committee** screen includes the following Related Lists Quick Links:

- **Resource Under Consideration:** Allows the user to associate resources under consideration. Refer to the previous task to view the full functionality.
- **Attendees:** Allows the user to associate attendees for the Selection Committee.

Task 4: Related List: Attendees

1. From the **Related Lists Quick Links** section, click **Attendees**. The **Attendees** screen displays.
2. Click **New Attendee**. The **New Person Involved: Attendees** pop-up displays.
3. In the **Name** field, enter the name of the Attendees.
4. Click **Save** to save the record. The record is successfully created.



System Tip!

Users can add a new person if the required person is not available in C-FIRST!.

Knowledge Check!

Question 1: If the Recruitment Limited to Geographic Area? field is marked as Yes, what must a user enter next?

- A. Initial Review Status
- B. Meeting Summary
- C. Provider Name
- D. Geographic Limit Explanation

Question 2: Which of the following are valid selections in the Type dropdown for Resources Under Consideration?

- A. Contract Provider
- B. ICPC
- C. Medical Specialist
- D. Kinship

Question 3: Which field becomes mandatory if Completed is selected in the Review Status dropdown?

- A. Abridge Reason

- B. Decision
- C. Outcome Details
- D. Recommendation

Question 4: Which of the following fields are required to be completed by users when creating a Permanency Case Referral?

- A. Referral Status
- B. Create New Permanency Case
- C. Case Person ID
- D. Referral Type

Module 4: Adoption & Subsidized Permanent Guardianship (SPG)

This module explains how to create an Adoption and SPG Case and manage related tasks. You will learn to create adoption or SPG case agreements, create adoption or SPG persons, and seal a case.

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

- Create Adoption Case Activities
- Create Guardianship Case Activities
- Determine Eligibility for Adoption Assistance Subsidy
- Create a Case Agreement for Adoption
- Determine Eligibility for SPG
- Create a Case Agreement for SPG

Lesson 1: Adoption Case Activities

In this lesson, learners create the final case record for either an **Adoption** or **Subsidized Permanent Guardianship (SPG)** pathway after the legal decision has been completed. For Adoption, the learner updates adoption information, documents key people involved, completes the court order, and verifies that the **Adoption Case** is created and linked to the Permanency Case.

Learning Objectives:

- Create an Adoption Case Activity
- Update the status of the Adoption Case Activity
- Add an Adoptive Person
- Add a Persons Involved

Task 1: Create an Adoption Case Activity

Now create an Adoption Case Activity for Jaylen#### to support the preparation and documentation of presentations to prospective adoptive families. The Provider Match search helps filter and match Jaylen#### to prospective families for adoption in C-FIRST! based on the Provider's preferences.

1. From the Homepage, click the **Home** dropdown and select **Cases**. The **Cases** screen displays.
2. Click the required **Case ID**. The **Case** screen displays.

3. Click the **Permanency Activities** hyperlink from the **Related List Quick Links** section. The **Permanency Activities** screen displays. The Permanency Activities List View displays the list of Permanency Activities created for the case, including details such as Activity ID, Case Person, Case Manager, Referral Type, Referral Status, Reason for Case, and Permanency Specialist. To view an existing record, click the hyperlink in the Referral ID column.
4. Click **New** to create a new permanency activity record. The **New Permanency Activities** pop-up displays.
5. Select the *Adoption Case Activity* radio button and click **Next**. The **New Permanency Activities: Adoption Case Activity** pop-up displays.



System Tip!

- The **Case Person ID** and **Referral Status** fields are mandatory fields. C-FIRST! displays an error if left blank and prevents the user from proceeding.
- The **Referral Type** field defaults to *Adoption Case Activity*.
- The **SSI Payments** field defaults to *No*.
- The **Abridge Reason** and **Abridge Notes** fields display only when users select the *Abridged* option from the **Referral Status** dropdown.

6. Enter the case person ID in the **Case Person ID** field



System Tip!

Users can add a new Case Person in case the required Case Person is not available in C-FIRST!

7. Click the **Customer Focused Goal Cohort** dropdown to select whether there is a cohort for a group of clients who share a common goal, allowing tailored adoption activities and support to better meet their specific needs.
8. The default option in the Referral **Status** dropdown is *Pending*.
9. Click **Save** to save the record. The record is successfully created.

10. Click the **Provider Match** tab. A list of search criteria displays.
Enter the provider's name in the **Provider Name** field.
11. Scroll down and click **Search**.
12. Select the **Provider ID** checkbox.
13. Click **Send Request**. A request is sent to the provider. Note:
The request is to ask the provider if they can accept this child.

Task 2: Update Adoption Case Activity Status

On Completion of the Adoption Activity for Jaylen Rush####, an Adoption Selection Committee record is worklisted. The Adoption Selection Committee is completed with an outcome of Home Selected.

1. Click the **Permanency Activities** hyperlink from the **Related List Quick Links** section. The **Permanency Activities** screen displays.
2. Click the **Activity ID** record with **Referral Type** as **Adoption Case Activity**. The record displays.
3. Click the **Pencil** icon next to the **Referral Status** field. The fields become editable.
4. Click the **Referral Status** dropdown and select *Completed* to indicate the status of the referral.
5. Click the **Decision** dropdown and select *Home Selected*.
6. Click **Save** to save the record. The record is updated.

Task 3: Add Adoptive Person

1. From the Homepage, click the **Home** dropdown and select **Cases**. The **Recently Viewed Cases** screen displays.
2. Click the **Case ID**. The **Case** screen displays.
3. Click the **Persons** hyperlink. The **Persons** screen displays.
4. Click the required **Case Person ID**. The **Case Person** pop-up displays.
5. Click the **Person** field and click the required Case Person hyperlink. The **Person** screen displays.
6. Click the **Person Type** hyperlink. The **Person Type** screen displays.
7. Click the **Person** hyperlink under the **Type** column.
8. Click the **Adoption Information** hyperlink in the **Related List Quick Links** section. The **Adoption Information** screen displays.

9. Click **New** to create a new record. The **New Adoption Information** pop-up displays.
10. Click the **Post Adoptive Child First Name** field and enter the name.
11. Click the **Adoption Information Status** dropdown and select **Pending**. The other options in the dropdown are:
 - Abridged
 - Completed
 - Worklisted



System Tip!

At least one post adoptive person must be added to set the **Adoption Information Status** to Completed.

12. Click the **Post Adoptive Child Last Name** field and enter the last name.
13. Click **Save**. The record is saved.

Task 4: Add Persons Involved

1. Click the **Persons Involved** hyperlink in the **Related List Quick Links** section on the **Adoption Information** screen.
2. Click **New** to create a new record. The **New Person Involved: Adoption Person** pop-up displays.
3. Click the **Role** dropdown and select the appropriate role. The options are:
 - Adoptive Parent 1
 - Adoptive Parent 2
 - Biological Parent 1
 - Biological Parent 2
 - Former Adoptive Parent 1
 - Former Adoptive Parent 2
 - Post-Adoptive Child
 - Pre-Adoptive Child
4. Click the **Unknown** dropdown and select *No*.
5. Click the **Person** field and enter the required Person name.
6. Scroll down to the **TPR Information** section.
7. Click the **TPR Decision Date** field and enter the date.
8. Click the **TPR Order** field and enter the order record ID.

Click **Save**.

Lesson 2: SPG/Guardianship Case Activities

In this lesson, you will create the final Case Record for the **Subsidized Permanent Guardianship (SPG)** pathway after the legal decision is complete. You will complete the legal guardianship workflow and verify that the **Permanent Guardianship** Case is created and linked to the Permanency Case. If the family the youth is placed with is interested in **Subsidized Permanent Guardianship**, the Permanency Specialist creates a Guardianship Referral record. On the Guardianship Referral, the Permanency Specialist adds the foster family as a Resource Under Consideration and completes all pre-approval information.

Learning Objectives:

- Create Guardianship Referral
- Guardianship Eligibility

Task 1: Create Guardianship Referral

The Associated Cases related list links the Treatment Case and Permanency Case together. When a Permanency Specialist receives a Permanency Case assignment, the system generates a task for them. The Guardianship Referral screen captures referrals for a child to find permanent and stable living arrangements. Users create Guardianship Referrals on a Permanency Case.

1. Click the **Home** dropdown on the Homepage and select **Cases**. The **Recently Viewed Cases** screen displays.
2. Click the required **Permanency Case**. The **Case** screen displays.
3. Click **Permanency Activities** from the **Related Lists Quick Links** section. The Permanency Activities List View displays the list of Permanency Activities created for the case, including details such as Activity ID, Case Person, Case Manager, Referral Type, Referral Status, Reason for Case, and Permanency Specialist.
4. Click **New** to create a new permanency activity record. The **New Permanency Activities** pop-up displays.
5. Select the **Guardianship Referral** radio button.

6. Click **Next** to proceed to add the guardianship referral details. The **New Permanency Activities: Guardianship Referral** pop-up displays.
7. Click the **Referral Date** field and enter a date.
8. Click the **Guardianship Referral Type** dropdown and select **Subsidized Guardianship**. The options in the dropdown are:
 - None
 - Non-Subsidized Guardianship
 - Subsidized Guardianship
9. Click the **Case Person ID** field and enter the name of the case person. **Note:** All clickable ID fields accept the name of the person or the unique ID that is associated with the person.
10. Click **Save** to save the record. The record is created.

Task 2: Resources Under Consideration

1. From the **Related List Quick Links** section, click the **Resources Under Consideration** hyperlink. The **Resources Under Consideration** screen displays.
2. Click **New Resource Under Consideration** to add a new record. The **New Person Involved: Resource Under Consideration Adoption Case Activity** pop-up displays.
3. In the **Case Person ID** field, enter the required Case Person Name.
4. Click the **Relationship** field and select Relative. The other Relationship options are:
 - Kin Relationship Established During Custodial Episode
 - Kin Relationship Established Prior to Custodial Episode
5. Click **Guardianship Type Requested** and select Subsidized Guardianship.
6. Click the **Reunification and Adoption Rules Out?** field and select Yes.
7. Click the **Strong Commitment to Care for Child?** field and select Yes.
8. Click the **Placed With Siblings in Prospective Home** field and select No.
9. Click the **Goal of Permanent Guardianship?** field and select Yes.
10. Click the **Strong Attachment Prospective Person?** field and select Yes.

11. Click the **Has the Child Been Consulted?** field and select Yes.
12. Navigate to the Referral Questions section and enter the relationship details in the **Relationship Details** field.
13. Click Save

Task 3: Guardianship Eligibility

Guardianship Eligibility is the set of requirements a youth and their family must meet to receive guardianship assistance. Under the Guardianship Assistance Program, States, Indian Tribes, and Tribal Organizations that choose to participate can provide guardianship assistance payments to relatives who take legal guardianship of eligible children they previously cared for as foster parents. In practice, an Eligibility Worker, Permanency Specialist, and Subsidy Specialist Supervisor review the youth's situation and documentation to determine whether the case qualifies for a guardianship subsidy so the guardian can be compensated appropriately. As part of the same determination, they also assess IV-E Eligibility so the agency can use the correct available funding source(s).

To determine Guardianship Eligibility, **Permanency Specialists** need to navigate to the **Eligibility** hyperlink from the **Related List Quick Links** section on the Person record. On a new Eligibility record pop-up, they need to answer the questions under the following section:

- Subsidized Permanent Guardianship Criteria
 - In Custody/Guardianship of DCS?
 - Goal of Permanent Guardianship?
 - Demonstrates Strong Attachment?
 - Age 12+ consultation?
 - In the Home for 6 Consecutive Months?
 - Reunification and Adoption Ruled Out?
 - Demonstrates Strong Commitment?
 - Sibling Exiting in the Same FFY?

Once the record is saved, the Permanency Specialist is routed to the Eligibility record screen where they can edit the record and add the information under the following section:

- Medical / Rehabilitative Care Needs
 - Medical/Rehabilitative Care Needs?
 - Medical/Rehabilitative Care Needs Detail

Then, the Permanency Specialists must update the **Eligibility Status** field to *Eligibility*. Once saved, a task is generated for the **Max Specialist**.

To determine eligibility, the **Max Specialist** must navigate to the **Eligibility** tab on the Eligibility record and answer the questions under the following sections:

- Financial Needs Requirements
 - Order With Contrary to the Welfare?
 - IV-E Payments: 6 Consecutive Months?
 - Six-month Period?
 - State Payments: 6 Consecutive Months?
 - State Six-Month Period?
 - Voluntary Placement Agreement?
 - IV-E Eligible Sibling, Same FFY?
 - Sibling Name(s)
 - Revenue Max Specialist Validation?
- Guardianship Determination
 - Override Determination
 - Removal Court Order Uploaded?

Once saved, the Max Specialist needs to click the **Calculate Eligibility** button to calculate eligibility before submitting it for approval (The result is displayed in the Standard Eligibility Determination field).

Then, the Max Specialist must navigate to the **Subsidy** tab and update the **Eligibility Status** to *Determined*. After saving the record, a task is generated for the Permanency Specialist to submit the record for approval.

Note: The **Max Specialists** may use the **Correct Eligibility** button to clone the existing eligibility record and make changes. All information from the original record is carried over to the new clone, with the exception of Standard Eligibility Determination, Eligibility Determination Date, Override Determination, Override Reason, and Notes field, which are blank until the determination rules are run again.

Additionally, the **Correct 18 and Over** button is visible to the Subsidy Supervisor if the youth is age 18 or older.

Lesson 3: Determining Eligibility for Adoption Assistance Subsidy

In this lesson, we will learn about how to create an eligibility record for Jaylen### and determine his eligibility for adoption.

Learning Objectives

- Create an adoption eligibility record in C-FIRST!
- Update the eligibility record and calculate eligibility results
- Submit the eligibility record

Task 1: Create Adoption Eligibility Record

1. From the Homepage, click the **Home** dropdown and select **Person**. The **Recently Viewed Person** screen displays.
2. Click on the Person's Name. The **Person** screen displays.
3. Click the **Eligibility** hyperlink from the **Related List Quick Links** section. The **Eligibility** screen displays.
4. Click **New** to add a new Adoption eligibility record. The **New Eligibility** pop-up displays.
5. Click the **Adoption Eligibility** radio button to capture the eligibility details and then click **Next**. The **New Eligibility: Adoption Eligibility** pop-up displays.
6. Click the **Subsidy Review Effective Date** field and enter *the date*.
7. Click the **Assigned Worker** field and select *Max Specialist*.
8. Click the **Legally Free for Adoption?** dropdown and select an option.
Click **Save**. The Adoption Eligibility record is created and displays. **Note:** The **Eligibility Type** field defaults to *Adoption Eligibility* and **Eligibility Status** defaults to *Pending*.
9. Scroll down to the **Special Needs** section. This section has the following fields:
 - Disability Which Substantially Limits?
 - Behavioral/Emotional Disorder?
 - Minority Race/Ethnicity, Age 2+?
 - Sibling Group?
 - Severe Abuse?
 - Deferred: Genetic/Medical History?
 - Deferred: 3+ Disrupted Placements?

- Deferred: Neonatal Abstinence Syndrome?
 - Intellectually Disabled?
 - Moderate-Severe Condition with Treatment
 - Caucasian, Age 9+?
 - 3+ Consecutive Years in DCS Custody?
 - SSI Medical/Disability Requirement?
 - Deferred: Prenatal Exposure to Toxins?
 - Deferred: Safe Haven?
10. Click the **pencil** icon next to the **Severe Abuse?** field. The fields become editable.
 11. Click the **Severe Abuse?** dropdown and select an option.
 12. Scroll down to the **Reasonable Efforts** section. This section has the following fields:
 - Foster Parent Adoption?
 - Required Recruitment Efforts?
 - Identified Pre-Adoptive Families?
 - Relative Adoption?
 13. Click the **Foster Parent Adoption?** dropdown and select an option.
 14. Click **Save**. Then the Medical/Rehabilitative Care Needs section displays.
 15. Scroll down to the **Medical/Rehabilitative Care Needs** section. Click the pencil icon next to the **Medical/Rehabilitative Care Needs** field and it becomes editable.
 16. Click the **Medical/Rehabilitative Care Needs?** dropdown and select an option.
 17. Click the **Eligibility Status** dropdown and select *status*. The options in the dropdown are:
 - Abridged
 - Completed
 - Determined
 - Eligibility
 - Modified
 - Pending
 - Worklisted
 18. Click **Save**. The record is saved.

Task 2: Determining Eligibility

Once the Permanency Specialist marks the **Eligibility Status** as *Eligibility*, a task is generated for the Max Specialist to determine eligibility.

1. Log in as the **Max Specialist**, and from the Homepage, click the **Notifications** icon. A list of notifications displays.
2. Click the **Adoption Eligibility Pending Eligibility Determination** notification. The Eligibility record screen displays.
3. Click the **Eligibility** tab. The **Fostering Connections** section under the **Eligibility** tab displays. This section has the following fields:
 - Legal Status?
 - Child of a Minor Parent?
 - Meets SSI Medical or Disability?
 - Prior Eligibility for Adoption Assist?
4. Click the **pencil** icon next to the **Legal Status?** field. The fields become editable.
5. Click the **Legal Status?** dropdown and select *Yes*.
6. Scroll down to the **Standard Eligibility** section. This section has the following fields:
 - Previous receipt of Adoption Assist?
 - SSI Medical and Financial Requirements
 - Meets July 16, 1996, AFDC Requirements?
 - Child of Minor IV-E Parent
7. Click the **Previous Receipt of Adoption Assist?** dropdown and select *No*.
8. Scroll down to the **Adoption Determination** section. The section has the following fields:
 - Fostering Connections Eligible?
 - Standard Eligibility Determination
 - Eligibility Determination Date
 - Removal Court Order Uploaded?
 - Override Determination
 - Override Reason
 - Notes
9. Click the **Removal Court Order Uploaded?** dropdown and select *Yes*.

10. Click **Save**. The record is saved.
11. Scroll up and click **Calculate Eligibility**. A message displays that eligibility has been calculated successfully and the result is displayed in the **Standard Eligibility Determination** field and in the **Fostering Connections?** field.
12. Click the **Subsidy** tab. The **General Information** section displays.
13. Click the **pencil** icon next to the **Eligibility Status** field. The fields become editable.
14. Click the **Eligibility Status** dropdown and select *Determined*.
15. Click **Save**. The record is saved.

Task 3: Submit the Eligibility Record

Once the Max Specialist determines eligibility and updates the status to *Determined*, a task is generated for the Permanency Specialist to submit the record for approval.

1. Log in as the **Permanency Specialist**, and from the **Homepage**, click the **Notifications** icon. A list of notifications displays.
2. Click the required notification. The **Eligibility Record** screen displays.
Note: Once the **Eligibility Status** is updated to *Determined*, the **Submit for Approval** button displays.
3. Click the **Approver** field and select the approver *Adoption/SPG Subsidy Supervisor*.
4. Click **Submit for Approval**. The **Submit for Approval** pop-up displays.
5. Click the **Comments** field and enter the required comments.
6. Click **Submit**. The Eligibility record is routed to the Subsidy Supervisor for approval.



Process Tip!

Once the Supervisor provides the necessary approvals to the Eligibility request, update the **Eligibility Status** to *Completed*. The record can no longer be edited. To edit, click the **Correct Eligibility** button to create a clone of the existing Eligibility record and make the necessary edits to it.

Lesson 4: Adoption Case Agreement

Case Agreements are created to capture Adoption subsidy information and maintain prior and current subsidy information, so that all payments are tracked.

Learning Objectives:

- Create Adoption Case Agreement
- Add a Provider Agreement
- Add a Provider Type for Adoption
- Seal a Case
- Restrict a Permanency Case
- Complete Case Person Detail Fields

Task 1: Create Adoption Case Agreement

Now let's create an adoption agreement between DCS and Jaylen Rush####'s Adoptive parent(s).

1. Log in as a **Permanency Specialist** and from the Home dropdown, click the **Cases** tab. The **Recently Viewed Cases** screen displays.
2. Click the desired **Permanency Case ID**. The case record displays.
3. Click the **Case Agreements** hyperlink from the **Related List Quick Links** section. The Cases Agreements List View displays details such as the Case Agreement ID, Agreement Type, Agreement Start Date, and Last Modified Date.
4. Click **New** to create a new case agreement for the Adoption case.
5. Select **Adoption Case Agreement** radio button and click **Next**. **The New Case Agreement: Adoption Case Agreement** pop-up displays.
6. Click the **Case Person ID** field and enter *Jaylen Rush####*.
7. Click the **Adoption Subsidy Agreement Type** dropdown and select *Active* to indicate status of the adoption subsidy agreement.

8. Click the **Rate Type** dropdown and select the rate type. The options from the dropdown are:
 - Extraordinary 1
 - Extraordinary 2
 - Extraordinary 3
 - Regular 0-11
 - Regular 12-20
 - Special Circumstances Rate 0-11
 - Special Circumstances Rate 12-20
9. Click the **Rate Schedule** dropdown and select the required option. The options in the dropdown are:
 - Current Rate Schedule
 - Rate schedule from the most recent Finalized Case Agreement.

Note: C-FIRST! will default this field to Rate schedule from the most recent Finalized Case Agreement, but it is editable.
10. The default value in the **Agreement Status** dropdown is *Pending*. The other options in the dropdown are:
 - Abridged
 - Completed
 - Finalized
 - Withdrawn
11. Enter the **Agreement Start Date**.
12. Enter the **Agreement End Date**.
13. Select the **Contract Cost Limit**.
14. Enter the **Eligibility End Date**.
15. Scroll down to the **Provider Information** section.
16. Click the **Last Name/Organization Name** field and enter the required provider name.
17. Click the **Approver Action Status** field and select *Sent to Final Approver*.
18. Click the **Supervisor** field and enter *Adoption/SPG Subsidy Supervisor*.
19. Click **Save**. The record is saved and the **Adoption Agreement** screen displays.
20. Click the **Submit for Approval** button.



System Tip!

- A Case Agreement cannot be started while a child is in custody.
- C-FIRST! does not let you complete Case Agreement prior to eligibility determination.
- Case Agreement End Date must be the youth's 18th birthday for Initial AA IV-E or Fostering Connections funded Case Agreements.
- For state funded subsidy records, the Agreement End Date cannot be greater than the first day of the 12th month (1 year) or 24th month (2 years) after the Contract Begin Date or the day of the youth's 18th birthday, whichever is sooner.
- There cannot be two active finalized Case Agreements with overlapping start and end dates.
- Agreement Status can only be updated to Finalized or Completed through the Case Agreement Approval Process.

Task 2: Add a Provider Agreement for Adoption

Now let's see how to access the Provider record to add a Provider Agreement for Adoption/SPG so the parent can get paid after the adoption is finalized.

1. Log in as an Adoption/SPG Subsidy Specialist
2. Click the **Provider** tab from the **Home** dropdown. The **Provider** Recently Viewed list view displays.
3. Click the Provider **Account Name** hyperlink.
4. 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*.
8. Click the **Sub-Contractors** dropdown, select from the options.
9. Click the **Contract ID** field, enter the *ID*.
10. Scroll down to the **Approval History** section.
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*.
17. Click **Search**. The search results display.
18. Click the checkbox on the desired record. Click **Associate**. The record has been associated successfully



Process Tip!

To create a Non-Contracted Agreement, repeat the same steps as Contracted Agreement and enter the details including **Agreement Start Date**, **Agreement End Date** and **Status** and click **Save**. Then click **Add Services** for the Non-Contracted Agreement, following the same steps as the Contracted Agreement.

Task 3: Add a Provider Type for Adoption

To create the **Adoption Type** you will have to navigate to view the comprehensive details of the Provider Agreement record created above.

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 the **Adoption** radio button and click **Next**.
5. Click the mandatory **Status** dropdown 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.

Task 4: Seal a Case

On the Treatment Case, the Adopted Youth is sealed by the Post Adoption Team. The Permanency Case is restricted.

1. Navigate to the Treatment Case for the Rush#### family.
2. Click the **Persons** hyperlink from the Related Lists Quick Links section.
3. Click the **Case Person ID** for the adopted youth.
4. In the **Fields** section, click the pencil icon in the **Seal Case Person? (Adoption)** field. The fields become editable. Select *Yes*.
5. Click **Save**. Navigate to the **Case Information** section of the treatment case.
6. Verify that the **Sealed Person Present on Case** field is set to *Yes*.

Task 5: Restrict a Permanency Case

Restricting a case is done for *Sealed Case Persons* where only certain users with the correct security/ability can view the Sealed Case.

1. Navigate to the Permanency Case for Jaylen Rush#### by either searching for the case name or by clicking the **Associated Cases** hyperlink in the Treatment Case **Related List Quick Links** section.
2. In the **Case Information** section, click the **pencil** icon in the **Restricted?** field.
3. Select *Yes*.
4. Select the reason for restriction from the **Restricted Reason** multi-select box. The options in the **Available** multi-select box are:
 - Conflict of Interest
 - Legal
 - Other
 - Requested Restriction
 - SIU
5. Click **Save**. **Note:** If the **Restricted Reason** is *Other* then enter details in the **Other Restricted Reason** field.

Lesson 5: Determining Eligibility for Subsidized Permanent Guardianship (SPG) Subsidy

In this lesson, we will learn about how to create an eligibility record for Jaylen### and determine his eligibility for SPG Guardianship.

Learning Objectives

- Create a SPG eligibility record in C-FIRST!
- Update the eligibility record and calculate eligibility results
- Submit the eligibility record

Task 1: Create SPG Eligibility Record

1. Log in as the **Permanency Specialist**, and from the **Homepage**, click the **Home** drop-down and select **Person**. The **Recently Viewed Person** screen displays.
2. Click *Jaylen Rush*. The **Person** screen displays.
3. Click the **Eligibility** hyperlink from the **Related List Quick Links** section. The **Eligibility** screen displays.
4. Click **New** to add a new **Guardianship** eligibility record. The **New Eligibility** pop-up displays.
5. Click the **Guardianship Eligibility** radio button to capture the eligibility details and then click **Next**. The **New Eligibility: Guardianship Eligibility** pop-up displays.
6. Navigate to the **General Information** section. Click the **Subsidy Review Effective Date** field and enter *a date*.
7. Click the **Approver** field and select Adoption/SPG Subsidy Supervisor.
8. Click the **Assigned Worker** field and select Permanency Specialist.
9. Navigate to the Subsidized Permanent Guardianship Criteria section. Click the **In Custody/Guardianship of DCS?** field and select Yes.
10. Click the **Goal of Permanent Guardianship?** field and select Yes.
11. Click the **Demonstrates Strong Attachment?** field and select Yes.
12. Click the **Age 12+ consultation?** field and select N/A.
13. Click the **In the Home for 6 Consecutive Months?** field and select Yes.

14. Click the **Reunification and Adoption Ruled Out?** field and select Yes.
15. Click the **Demonstrates Strong Commitment?** field and select Yes.
16. Click the **Sibling Exiting in the Same FFY?** field and select N/A.
17. Navigate to the Financial Needs Requirement section. Click in the **Voluntary Placement Agreement?** field and select Yes.
18. In the Subsidy Tab scroll down to the **Medical/Rehabilitative Care Needs** section.
19. Click the **Medical/Rehabilitative Care Needs?** pencil icon, click the drop-down and select Yes.
20. Click the **Medical/Rehabilitative Care Needs Detail** field and enter the required details.
21. Click the **Eligibility Status** drop-down and select *Eligibility*. The options in the drop-down are:
 - Abridged
 - Completed
 - Determined
 - Eligibility
 - Modified
 - Pending
 - Worklisted
22. Click **Save**. The record is saved. **Note:** When the above status is updated to "Eligibility"; this triggers the task in the system for the **Max Specialist** to complete the eligibility record.
23. Click Save.



Process Tip!

C-FIRST! includes different show and hide logic for eligibility records based on whether it is an initial record, or a record that has been submitted and is being reviewed. What this means is that the fields that appear on eligibility records are dependent on whether it is a "initial" record versus a "review" record; a record that has been previously submitted is either being reviewed or updated.

Task 2: Determining Eligibility

Once the **Permanency Specialist** marks the **Eligibility Status** as *Eligibility*, a task is generated for the **Max Specialist** to determine eligibility.

1. Log in as the **Max Specialist**, and from the **homepage**, click the **Notifications** icon. A list of notifications displays.
2. Click the **Complete Guardianship Eligibility Determination** notification. The Eligibility record screen displays.
3. Click the **Order With Contrary to the Welfare?** field and select Yes.
4. Click the **Voluntary Placement Agreement?** field and select Yes.
5. Click the **IV-E Payments: 6 Consecutive Months?** field and select Yes.
6. Click the **Six-month Period** field and enter the specific consecutive six-month period.
7. Click the **IV-E Eligible Sibling, Same FFY?** field and select N/A.
8. Click the **Revenue Max Specialist Validation?** and select Yes.
9. Click the **Calculate Eligibility** button. The system evaluates all entered information and automatically populates the **Standard Eligibility Determination** field with one of the following outcomes:
 - SPG IV-E Eligible
 - SPG State Eligible
 - Not Eligible
10. Verify that the **Standard Eligibility Determination** field reflects the expected outcome based on the information entered.
11. Update the **Eligibility Status** field to **Determined** and save the record. A task is automatically triggered for the Permanency Specialist to submit the record for supervisor approval.
12. Click **Save**. The record is saved.

Note: When eligibility needs to be re-run for continued eligibility, the above steps need to be followed. However, since there is an existing initial eligibility record, the screen is updated to reflect a “review” eligibility record.

Task 3: Submit the Eligibility Record

Once the **Max Specialist** determines eligibility and updates the status to *Determined*, a task is generated for the Permanency Specialist to submit the record for approval.

1. Log in as the **Permanency Specialist**, and from the **homepage**, click the **Notifications** icon. A list of notifications displays.
2. Click the required notification. The **Eligibility** record screen displays.
Note: Once the **Eligibility Status** is updated to *Determined*, the **Submit for Approval** button displays.
3. Click the **Approver** field and enter the *Subsidy Supervisor*.
4. Click **Submit for Approval**. The **Submit for Approval** pop-up displays.



Process Tip!

Once the Supervisor provides the necessary approvals to the Eligibility request, update the **Eligibility Status** to *Completed*. The record cannot be edited anymore. To edit, click the **Correct Eligibility** button to create a clone of the existing Eligibility record and make the necessary edits to it.

5. Click the **Comments** field and enter the required comments.
6. Click **Submit**. The Eligibility record is routed to the Supervisor for approval.

Lesson 6: SPG Case Agreement

Task 1: Create SPG Case Agreement

Learning Objectives:

- Create SPG Case Agreement
- Add a Provider Agreement
- Add a Provider Type for SPG

Now let's create an SPG agreement between DCS and Jaylen Rush####'s Permanent Guardian

1. Log in as a **Permanency Specialist** and from the Home dropdown, click the **Cases** tab. The **Recently Viewed Cases** screen displays.
2. Click the desired **Permanency Case ID**. The case record displays.
3. Click the **Case Agreements** hyperlink from the **Related List Quick Links** section. The Cases Agreements List View displays details such as the Case Agreement ID, Agreement Type, Agreement Start Date, and Last Modified Date.
4. Click **New** to create a new case agreement for the permanency case.
5. Select **SPG Case Agreement** radio button and click **Next**. The **New Case Agreement: SPG Case Agreement** pop-up displays.
6. Click the **Case Person ID** field and enter *Jaylen Rush####*.
7. Click the **Rate Type** dropdown and select the rate type. The options from the dropdown are:
 - Extraordinary 1
 - Extraordinary 2
 - Extraordinary 3
 - Regular 0-11
 - Regular 12-20
 - Special Circumstances Rate 0-11
 - Special Circumstances Rate 12-20
8. Click the **Rate Schedule** dropdown and select the required option. The options in the dropdown are:
 - Current Rate Schedule
 - Rate schedule from the most recent Finalized Case Agreement.

Note: C-FIRST! will default this field to Rate schedule from the most recent Finalized Case Agreement, but it is editable.
9. The default value in the **Agreement Status** dropdown is *Pending*. The other options in the dropdown are:
 - Abridged
 - Completed
 - Finalized
 - Withdrawn
10. Enter the **Agreement Start Date**.
11. Enter the **Agreement End Date**.
12. Select the **Contract Cost Limit**.
13. Enter the **Eligibility End Date**.
14. Scroll down to the **Provider Information** section.

15. Click the **Last Name/Organization Name** field and enter the required provider name.
16. Click the **Approver Action Status** field and select *Sent to Final Approver*.
17. Click the **Supervisor** field and enter *Adoption/SPG Subsidy Supervisor*.
18. Click **Save**. The record is saved and the **SPG Agreement** screen displays.
19. Click the **Submit for Approval** button.



System Tip!

- A Case Agreement cannot be started while a child is in custody.
- C-FIRST! does not let you complete Case Agreement prior to eligibility determination.
- Case Agreement End Date must be the youth's 18th birthday for IV-E funded SPG Case Agreements.
- For state funded subsidy records, the Agreement End Date cannot be greater than the first day of the 12th month (1 year) or 24th month (2 years) after the Contract Begin Date or the day of the youth's 18th birthday, whichever is sooner.
- There cannot be two active finalized Case Agreements with overlapping start and end dates.
- Agreement Status can only be updated to Finalized or Completed through the Case Agreement Approval Process.

Task 2: Add a Provider Agreement for SPG

Now let's see how to access the Provider record to add a Provider Agreement for SPG so the parent can get paid after the adoption is finalized.

1. Click the **Provider** tab from the **Home** dropdown. The **Provider** Recently Viewed list view displays.
2. Click the Provider **Account Name** hyperlink.
3. Click the **Agreements** hyperlink from the **Related List Quick Links** section. The **Agreements** list view displays.
4. Click **New**. The **New Agreement** pop-up displays.
5. Select the **Contracted** radio button and click **Next**. The **New Agreement: Contracted** screen displays.

6. The following are the fields that a user needs to complete in the **Information** section:
7. Click the **Agreement Start Date** field, enter the *date*.
7. Click the **Agreement End Date** field, enter the *date*.
9. Click the **Sub-Contractors** dropdown, select from the options.
10. Click the **Contract ID** field, enter the *ID*.
11. Scroll down to the **Approval History** section.
13. Click the **Assigned Supervisor** field, enter the *supervisor*.
14. Click **Save**. A new Contracted agreement has been created successfully.
15. Click the **Agreement Services** hyperlink from the **Related List Quick Links** section. The **Agreement Services** list view displays.
16. Click **Add Services**. The **Associate Services** screen displays.
19. Click the **Any Taxonomy Level Search** field, enter the *level*.
20. Click **Search**. The search results display.
21. Click the checkbox on the desired record. Click **Associate**. The record has been associated successfully



Process Tip!

To create a Non-Contracted Agreement, repeat the same steps as Contracted Agreement and enter the details including **Agreement Start Date**, **Agreement End Date** and **Status** and click **Save**. Then click **Add Services** for the Non-Contracted Agreement, following the same steps as the Contracted Agreement.

Task 3: Add a Provider Type for SPG

To create the **Guardianship Type** you will have to navigate to view the comprehensive details of the Provider Agreement record created above.

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 the **Guardianship** radio button and click **Next**.

5. Click the mandatory **Status** dropdown 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.

Knowledge Check!

Question 1: Which field must be completed before you can save an Adoption Case Activity?

- A. Provider Match
- B. Case Person ID
- C. Decision
- D. Rate Schedule

Question 2: If a family is chosen for adoption, what decision should you pick when updating the Adoption Case Activity?

- A. Pending
- B. Abridged
- C. Home Selected
- D. Finalized

Question 3: Which type of Guardianship Referral should you choose for an SPG case?

- A. Permanent Placement
- B. Non-Subsidized Guardianship
- C. Subsidized Guardianship
- D. None

Question 4: How do you restrict a Permanency Case for a sealed case person?

- A. Change Agreement Status to finalized
- B. Select Yes for Restricted? And choose a reason
- C. Complete the Provider Match search
- D. Change Eligibility Status to Determined

Module 5: Court & Legal

Court and Legal functions in C-FIRST! track all court activity from petition filing through order completion. Petitions, motions, court orders, and hearings are separate record types that link together chronologically. Accurate court documentation supports compliance tracking and informs case planning decisions across worker roles.

After completing the module, you will be able to:

- Review Legal Timelines
- Manage the Custody Records of the child
- Review Legal Status for a child
- Review petitions and motions on a case
- Document court orders and link court hearings
- Update Person Records after a Court Hearing

Lesson 1: Legal Timelines

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

Learning Objectives

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

Task 1: Access the Legal Timeline

Jaylen Rush#### and Aaliyah Rush#### have an open case with linked legal activities. Access the Legal Timeline to review the chronological history of legal events for the Rush#### family Case.

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



System Tip!

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

Task 2: Review Legal Events on the Legal Timeline

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

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



Process Tip!

C-FIRST! can automatically link certain legal events, such as Adoption Petitions and Adoption Court Orders/Hearings. Users

can also manually link events, such as Petition to Petition, Petition to Court Order/Hearing, or Court Order/Hearing to Court Order/Hearing.



System Tip!

- Matching colors indicate that legal events are linked to one another. Use the color coding to identify which Petitions/Motions are associated with which Court Orders/Hearings.
- C-FIRST! generates *Custody Start* and *Custody End* bubbles from Custody records. These bubbles follow the same color logic as Court Orders/Hearings and Petitions/Motions.

Lesson 2: Custody Records and Legal Status

C-FIRST! tracks custody episodes and legal statuses for children associated with a case. Users create and manage these records from the Case Person record to document court-ordered custody and changes in legal status.

Learning Objectives

- Navigate to the Custody related list from a Case Person record in C-FIRST!
- Create a new Custody record and populate required fields for an active custody episode

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

Jaylen Rush#### has been removed from his home and placed with his maternal grandmother, Dorothy Rush####. Navigate to the Custody related list on Jaylen Rush####'s Case Person record to view and manage custody records.

1. Navigate to the Case record for the Rush#### family.
2. Locate the Case Person record for Jaylen Rush#### on the case.
3. Click the **Case Person** record for Jaylen Rush####. C-FIRST! displays the **Case Person** detail screen.
4. Click **Custody** from the **Related List Quick Links** section. C-FIRST! scrolls to the **Custody** related list.
5. Review the **Custody** list view. C-FIRST! displays columns for **Custody ID**, **Custody Status**, **Start Date**, and **End Date**.



System Tip!

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

The Custody End Date and the Custody End Reason are dependent on each other. When one field is updated, the other must be updated as well. C-FIRST! also prevents the End Date from being set to a future date.

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

Before continuing, review the Custody detail screen for Jaylen Rush#### to understand how C-FIRST! enforces validation rules and populates read-only fields on the record.

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



System Tip!

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



Process Tip!

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

Lesson 3: Review Legal Status

Learning Objectives:

- Navigate to the Legal Statuses related list from a Case Person record in C-FIRST!
- Create a new Legal Status record and populate required fields

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

Navigate to the Legal Statuses related list for Jaylen Rush#### to document a new legal status for the child.

1. Navigate back to the **Case Person** record for Jaylen Rush####.
2. Click **Legal Statuses** from the **Related List Quick Links** section. C-FIRST! scrolls to the **Legal Statuses** related list.
3. Review the **Legal Statuses** list view. C-FIRST! displays columns for **Legal Status ID**, **Legal Status**, **Start Date**, **End Date**, and **Created Date**.



System Tip!

Click the hyperlink in the **Legal Status ID** column to open an existing Legal Status record for viewing or editing.

Task 2: Create a Legal Status Record for a Child

Let's create a new Legal Status record for Jaylen Rush#### to document his current legal status following the custody determination.

1. Click **New** on the **Legal Statuses** related list. C-FIRST! displays the new **Legal Status** record pop-up.
2. Click the **Legal Status** dropdown. Select the applicable legal status value for the child.
3. Enter the legal start date in the **Legal Start Date** field.
4. Review the **Status** field to confirm C-FIRST! defaulted the value to *Pending*.
5. Click the **Status** dropdown. Select *Active*.

6. Click **Save**. C-FIRST! saves the record and displays the **Legal Status** detail screen.



System Tip!

C-FIRST! defaults the **Status** to *Pending* when a new Legal Status record is created. Update the **Status** to *Active* once the legal status has been confirmed.



Process Tip!

Only a Business Administrator can update the **Status** to *Abridged*. When the **Status** is *Abridged*, the **Abridge Reason** and **Abridge Notes** fields are required. The **Abridge Reason** defaults to *Created in Error*.

Lesson 4: Court and Legal for Adoption Finalization

Petition records in C-FIRST! allow legal staff to document and track court filings for Termination of Parental Rights and Adoption proceedings. This lesson covers creating petition records, reviewing system defaults, and updating petition statuses to completion.

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

Learning Objectives

- Navigate to the Court Orders and Hearings list view from a Case record
- Review the Court Order/Hearing History for a Court Order/Hearing record

Task 1: Access the Court Orders and Hearings List View

Review court orders and hearings for the Rush#### Case. Jaylen Rush#### and Aaliyah Rush#### were placed with Dorothy Rush#### following allegations of physical abuse and neglect against Denise Rush#### and DeShawn Mitchell####.

1. Navigate to the Permanency Case record for the Rush#### family.
2. Locate the **Related List Quick Links** section on the Case record.
3. Click **Court Orders and Hearings** from the **Related List Quick Links** section. C-FIRST! displays the **Court Orders and Hearings** list view.
4. Review the list view columns: **Court Order/Hearing ID, Record Type, Order Type, Children, Date of Hearing, Court County, Court Order/Hearing Status, and Order Date.**



System Tip!

C-FIRST! populates the **Children** column with a comma-separated list of child names from the **Children** related list on each Court Order/Hearing record. Click a hyperlink in the **Court Order/Hearing ID** column to open an existing record.

Task 2: Access the TPR Petitions

Review court orders and hearings for the Rush#### Case. Jaylen Rush#### and Aaliyah Rush#### were placed with Dorothy Rush#### following allegations of physical abuse and neglect against Denise Rush#### and DeShawn Mitchell####.

1. Navigate to the Permanency Case record for the Rush#### family.
2. Locate the **Related List Quick Links** section on the Case record.
3. Click **Petitions and Motions** from the **Related List Quick Links** section. C-FIRST! displays the **Petitions and Motions** list view.
4. Review the list view columns: **Petition/Motion ID, Record Type, Children, Petition/Motion Type, Petition/Motion Date, Court County, and Petition/Motion Status.**

Task 3: Create an Adoption Petition

Let's create an Adoption Petition for the Rush#### Case. Jaylen Rush#### and Aaliyah Rush#### were placed with Dorothy

Rush#### following allegations of physical abuse and neglect against Denise Rush#### and DeShawn Mitchell####.

1. Navigate to the Case record. Click **Petitions and Motions** from the **Related List Quick Links** section
2. Click **New**. C-FIRST! displays the record type pop-up for a new Petition/Motion record.
3. Select the **Adoption Petition** radio button. Click **Next**, the **New Petition/Motion: Adoption Petition** pop-up will display.
4. Enter all required fields and any known information in the pop-up. Click **Save**. C-FIRST! saves the new record and opens the **Adoption Petition** detail screen.
5. Review the Petition/Motion Status field. C-FIRST! defaults this field to **Pending**.
6. Enter the Petition/Motion Date. Do not enter a future date.
7. Click the **Court County** dropdown.
8. Select the applicable county. C-FIRST! populates the **Court County** field. If **Out of State** is selected, **Court State** cannot be **Tennessee**.
9. Review the **Court State** field. C-FIRST! defaults this field to **Tennessee** when a new Adoption Petition is created.
10. Click the **Court Type** dropdown.
11. Select the applicable court type.
12. Enter docket number in the **Docket Number** field, if known.
13. Click the **Judge** dropdown. C-FIRST! displays a list of judges filtered by the selected county.
14. Select the applicable judge. If **Judge** is Other, enter the name in **Other Judge**.
15. Enter any other known information, such as **Notes** or **Non-DCS Petitioner**, if needed.
16. Click **Save**. C-FIRST! saves the Adoption Petition record and returns to the **Petitions and Motions** list view.

Task 4: Record an Adoption Court Order and Hearing

The adoption hearing for Jaylen Rush#### has taken place. C-FIRST! worklisted an Adoption Court Order and Hearing when the Adoption Petition was completed. Access the worklisted record and enter the hearing and court order details.

1. Navigate to the Case record.
2. Click **Court Orders and Hearings** from the **Related List Quick Links** section. C-FIRST! displays the **Court Orders and Hearings** list view.
3. Locate the **Adoption Court Order and Hearing** record and click the hyperlink in the **Court Order/Hearing ID** column. C-FIRST! displays the **Adoption Court Order and Hearing** detail screen.
4. Review the **Court Order/Hearing Status** field. C-FIRST! defaults this field to *Pending*.
5. Enter the **Date of Hearing**.
6. Enter the **Date of Decision**.
7. Click the **Court County** dropdown. C-FIRST! displays a list of Tennessee counties.
8. Select the applicable county. C-FIRST! populates the **Court County** field.
9. Click the **Court Type** dropdown. C-FIRST! displays a list of court types.
10. Select the applicable court type. C-FIRST! populates the **Court Type** field.
11. Enter the docket number in the **Docket Number** field, if known.
12. Click the **Judge** dropdown. C-FIRST! displays a list of judges filtered by the selected county.
13. Select the applicable judge. C-FIRST! populates the **Judge** field.
14. Click **Save**. C-FIRST! saves the **Adoption Court Order and Hearing** record.



System Tip!

- C-FIRST! pre-populates the **Court State** field to *Tennessee* and carries over the associated **Adoption Petition** to the

Associated Petitions/Motions related list on the Court Order record.

- C-FIRST! filters the **Judge** dropdown based on the county selected in the **Court County** field. If the assigned judge is not listed, select *Other* and enter the judge's name in the **Other Judge** field.

Task 5: Complete the Adoption Court Order and Hearing

The judge granted the adoption for Jaylen Rush####. Let's record the court decision, assign the Adoption/SPG Subsidy Specialist, and complete the Adoption Court Order and Hearing record. Completing the record with a decision of Adoption Granted triggers C-FIRST! to create an Adoption Case.

1. Click the **Court Decision** dropdown on the **Adoption Court Order and Hearing** detail screen. C-FIRST! displays a list of court decisions.
2. Select *Adoption Granted*. C-FIRST! populates the **Court Decision** field.
3. Click the **Adoption/SPG Subsidy Specialist** field. C-FIRST! displays a user search dialog.
4. Enter the name of the assigned specialist in the search field. C-FIRST! displays matching users.
5. Select the applicable specialist from the results. C-FIRST! populates the **Adoption/SPG Subsidy Specialist** field.
6. Click the **Court Order/Hearing Status** dropdown. C-FIRST! displays a list of statuses.
7. Select *Completed*. C-FIRST! populates the **Court Order/Hearing Status** field.
8. Click **Save**. C-FIRST! saves the record, creates an Adoption Case, and links it to the Permanency Case through the **Associated Cases** related list.



Process Tip!

When **Court Order/Hearing Status** is *Completed* and **Court Decision** is *Adoption Granted*, C-FIRST! creates an Adoption Case. The Post Adoptive Child from the Adoption Information

record is added as a Case Person, and the Adoption/SPG Subsidy Specialist is added as the Primary Worker on the Assigned Users related list.



System Tip!

C-FIRST! sends an email notification to the Post Adoption Records Unit confirming the adoption has been finalized. The email includes the Post Adoptive Child name, the Date of Decision, and the new record identification number.

Lesson 5: Court and Legal for SPG Finalization

Petition records in C-FIRST! allow legal staff to document and track court filings for Termination of Parental Rights and Guardianship proceedings. This lesson covers creating petition records, reviewing system defaults, and updating petition statuses to completion.

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

Learning Objectives

- Navigate to the Court Orders and Hearings list view from a Case record
- Review the Court Order/Hearing History for a Court Order/Hearing record
- Access Petitions
- Create a SPG Petition
- Add a Child to a SPG Petition
- Add a Proposed Provider to a SPG Petition
- Record a SPG Court Order and Hearing
- Complete the Court Order and Hearing

Task 1: Access the Court Orders and Hearings List View

Review court orders and hearings for the Rush#### Case. Jaylen Rush#### and Aaliyah Rush#### were placed with Dorothy Rush#### following allegations of physical abuse and neglect against Denise Rush#### and DeShawn Mitchell####.

1. Navigate to the Permanency Case record for the Rush#### family.
2. Locate the **Related List Quick Links** section on the Case record.
3. Click **Court Orders and Hearings** from the **Related List Quick Links** section. C-FIRST! displays the **Court Orders and Hearings** list view.
4. Review the list view columns: **Court Order/Hearing ID**, **Record Type**, **Order Type**, **Children**, **Date of Hearing**, **Court County**, **Court Order/Hearing Status**, and **Order Date**.



System Tip!

C-FIRST! populates the **Children** column with a comma-separated list of child names from the **Children** related list on each Court Order/Hearing record. Click a hyperlink in the **Court Order/Hearing ID** column to open an existing record.

Task 2: Access Petitions

Review court orders and hearings for the Rush#### Case. Jaylen Rush#### and Aaliyah Rush#### were placed with Dorothy Rush#### following allegations of physical abuse and neglect against Denise Rush#### and DeShawn Mitchell####.

1. Navigate to the Permanency Case record for the Rush#### family.
2. Locate the **Related List Quick Links** section on the Case record.
3. Click **Petitions and Motions** from the **Related List Quick Links** section. C-FIRST! displays the **Petitions and Motions** list view.

4. Review the list view columns: **Petition/Motion ID, Record Type, Children, Petition/Motion Type, Petition/Motion Date, Court County,** and **Petition/Motion Status.**

Task 3: Create a SPG Petition

1. Navigate to the Case record. Click **Petitions and Motions** from the **Related List Quick Links** section
2. Click **New**. C-FIRST! displays the record type pop-up for a new Petition/Motion record.
3. Select the **Subsidized Permanent Guardianship Petition** radio button. Click **Next**, the **New Petition/Motion: Guardianship Petition** pop-up will display.
4. Enter all required fields and any known information in the pop-up.
5. Click **Save**. C-FIRST! saves the new record and opens the **Guardianship Petition** detail screen.
6. Review the Petition/Motion Status field. C-FIRST! defaults this field to **Pending**.
7. Enter the Petition/Motion Date. Do not enter a future date.
8. Click the **Court County** dropdown.
9. Select the applicable county. C-FIRST! populates the **Court County** field. If **Out of State** is selected, **Court State** cannot be **Tennessee**.
10. Review the **Court State** field. C-FIRST! defaults this field to **Tennessee** when a new Guardianship Petition is created.
11. Click the **Court Type** dropdown.
12. Select the applicable court type.
13. Enter docket number in the **Docket Number** field, if known.
14. Click the **Judge** dropdown. C-FIRST! displays a list of judges filtered by the selected county.
15. Select the applicable judge. If **Judge** is Other, enter the name in **Other Judge**.
16. Enter any other known information, such as **Notes** or **Non-DCS Petitioner**, if needed.
17. Click **Save**. C-FIRST! saves the Guardianship Petition record and returns to the **Petitions and Motions** list view.

Task 4: Add a Child to a SPG Petition

1. Select the **Children** hyperlink from the Related List Quick Links.
2. Select **New Child**. The New Person Involved: Court Order/Hearing Children screen displays.
3. Click the **Case Person ID** field, and the child's name should be displayed. If not start typing in the child's name then select it once it populates. If there is no child in the system select New Case Person.
4. Click **Save**.

Task 5: Add a Proposed Provider to a SPG Petition

1. Navigate back to the Petition/Motion screen.
2. Click the **Proposed Provider** hyperlink from the Related List Quick Links.
3. Select **New Proposed Provider**. The New Person Involved: Proposed Provider should be displayed.
4. Click the **Case Person ID** field, and the child's name should be displayed. If not start typing in the child's name then select it once it populates. If there is no child in the system select New Case Person.
5. Click the **Agency** field and select the Agency name from the list. If the agency name is not shown on the recent list start typing in the agency's name then select it once it populates. If the agency is not in the system select New Provider.
6. Click **Save**.
7. Navigate back to the Petition/Motion screen.
8. Select the pencil icon in the **Petition/Motion Status** field.
9. Click the drop down menu and select Completed.
10. Click **Save**.

Task 6: Record a SPG Court Order and Hearing

1. Navigate to the Case record.
2. Click **Court Orders and Hearings** from the Related List Quick Links section. C-FIRST! displays the Court Orders and Hearings list view.
3. Click New

4. Click the **Subsidized Permanent Guardianship Court Order and Hearing** radio button. C-FIRST! displays the **Subsidized Permanent Guardianship Court Order and Hearing** detail screen.
5. Review the **Court Order/Hearing Status** field. C-FIRST! defaults this field to *Pending*.
6. Enter the **Date of Hearing**.
7. Enter the **Date of Decision**.
8. Click the **Court County** dropdown. C-FIRST! displays a list of Tennessee counties.
9. Select the applicable county. C-FIRST! populates the **Court County** field.
10. Click the **Court Type** dropdown. C-FIRST! displays a list of court types.
11. Select the applicable court type. C-FIRST! populates the **Court Type** field.
12. Enter the docket number in the **Docket Number** field, if known.
13. Click the **Judge** dropdown. C-FIRST! displays a list of judges filtered by the selected county.
14. Select the applicable judge. C-FIRST! populates the **Judge** field.
15. Click **Save**. C-FIRST! saves the **Guardianship Court Order and Hearing** record.

Task 7: Complete the SPG Court Order and Hearing

1. Click the **Court Decision** dropdown on the **Subsidized Permanent Guardianship Court Order and Hearing** detail screen. C-FIRST! displays a list of court decisions.
2. Select *Guardianship Approved*. C-FIRST! populates the **Court Decision** field.
3. Click the **Adoption/SPG Subsidy Specialist** field. C-FIRST! displays a user search dialog.
4. Enter the name of the assigned specialist in the search field. C-FIRST! displays matching users.

5. Select the applicable specialist from the results. C-FIRST! populates the **Adoption/SPG Subsidy Specialist** field.
6. Click the **Court Order/Hearing Status** dropdown. C-FIRST! displays a list of statuses.
7. Select *Completed*. C-FIRST! populates the **Court Order/Hearing Status** field.
8. Click **Save**. C-FIRST! saves the record, creates a SPG Case, and links it to the Permanency Case through the **Associated Cases** related list.

Lesson 6: Updating Person Records

In this lesson, you will learn how to update the Person record for a child after their adoption is finalized as the case manager and Permanency Specialist.

Learning Objectives:

- Add Adoptive Person
- Add Persons Involved
- Add Post Adoptive Persons
- Update Custody Details

Task 1: Add Post Adoptive Persons

1. Click the **Persons** hyperlink. The **Persons** screen displays.
2. Click the required **Case Person ID**. The **Case Person** pop-up displays.
3. Click the **Person** field and click the required Case Person hyperlink. The **Person** screen displays.
4. Click the **Person Type** hyperlink. The **Person Type** screen displays.
5. Click the **Person** hyperlink under the **Type** column.
6. Click the **Adoption Information** hyperlink in the **Related List Quick Links** section. The **Adoption Information** screen displays.
7. Click the **Adoption Information ID** hyperlink
8. Click **Add Post Adoptive Person** on the **Adoption Information** screen.
9. A message displays that an adoptive person has been added.

Note: The Post Adoptive Person is added to the **Persons Involved** list. Once the post adoptive person record is saved, the pre-adoptive person record is added as Persons Involved on the Adoption Information screen. Additional Persons Involved can be added, such as Adoptive Parent 1 and 2. Upon completion of this record, the Post Adoptive Person will have their own unique Person record and PID in C-FIRST!. Users need to regenerate the PID for the Post Adoptive Person by clicking **Generate PID**.



Process Tip!

Generate PID should not be clicked until after the Adoption has been legally finalized in court.

Task 2: Update Custody Details

1. From the **Related List Quick Links** section, click the **Custody** hyperlink. The **Custody** screen displays.
2. Click the Custody ID with **Custody Status** as **Active**. The custody record displays.
3. Click the **End Date** field and click the **Pencil** icon. The field becomes editable.
4. Enter the required end date in the **End Date** field.
5. Click the **Custody End Reason** dropdown and select **Adoption**.
6. Click the **VPA Custody** dropdown and select **Yes**.
7. Click the **Custody Status** dropdown and select **Inactive**.
8. Scroll down to the **Removal Information** section.
9. Click the **Caregiver 1 Name** field and enter the name.
10. Click the **Relationship** dropdown and select the relationship.
11. Click **Save**. The record is modified.

Knowledge Check!

Question 1: Where do you navigate to access the Legal Timeline for a child in C-FIRST!?

- A. The Case record
- B. The Person Type record, then the Timeline Tab
- C. The Court Orders and Hearing list view
- D. The Related List Quick Links on the Case record

Question 2: When navigating to the Court Orders and Hearings list view, which section of the Case record do you click to locate it?

- A. The Timeline Tab
- B. The Case Person record
- C. The Related List Quick Links section
- D. The Persons Involved section

Question 3: Where can you find the Petitions and Motions list view in C-FIRST!?

- A. From the Person record under the Timeline Tab
- B. From the Case record under Related List Quick Links
- C. From the Legal Status record
- D. From the Court Orders and Hearings list view

Question 4: After completing an Adoption Court Order and Hearing with a decision of Adoption Granted, what does C-FIRST! automatically create?

- A. A Treatment Case
- B. A Legal Status record
- C. An Adoption Case
- D. A new Custody Record

Question 5: When creating a new Legal Status record in C-FIRST!, what does the system automatically default the Status field to?

- A. Active
- B. Completed
- C. Abridged
- D. Pending

Module 6: Managing Records Post Finalization

After completing the module, you will be able to:

- Complete Eligibility Reviews
- Review and Add Case Agreements

Lesson 1: Eligibility Review Records

Learning Objectives:

- Create an Eligibility Review Record

Task 1: Create the Eligibility Review Record

1. Log in as the **Subsidy Specialist**, and from the **Homepage**, click the **Home** drop-down and select **Person**. The **Recently Viewed Person** screen displays.
2. Click *Jaylen Rush*. The **Person** screen displays.
3. Click the **Eligibility** hyperlink from the **Related List Quick Links** section. The **Eligibility** screen displays.
4. Click **New** to add a new Guardianship or Adoption Assistance eligibility record. The **New Eligibility** pop-up displays.
5. Click the **Guardianship Eligibility** radio button to capture the eligibility details and then click **Next**. The **New Eligibility: Guardianship Eligibility** pop-up displays.
6. Navigate to the **General Information** section. Click the **Subsidy Review Effective Date** field and enter *a date*.
7. Click the **Assigned Worker** field and select Adoption/SPG Subsidy Specialist.
8. Click the **Approver** field and select Adoption/SPG Subsidy Supervisor.
9. Click the **Eligibility Status** drop-down, this displays as Pending.
10. Navigate to the Subsidized Permanent Guardianship Criteria section and answer all required fields in the section.
11. Click the Calculate Eligibility button.
12. Click **Save**. The Eligibility record is saved.
13. Click on the Eligibility tab and scroll down to the Financial Needs Requirements.

14. Click the **Order With Contrary to the Welfare?** field and select Yes.
15. Click the **Voluntary Placement Agreement?** field and select Yes.
16. Click the **IV-E Payments: 6 Consecutive Months?** field and select Yes.
17. Click the **Six-month Period** field and enter the specific consecutive six-month period.
18. Click the **IV-E Eligible Sibling, Same FFY?** field and select N/A.
19. Click the **Revenue Max Specialist Validation?** and select Yes.
20. Click the **Calculate Eligibility** button. The system evaluates all entered information and automatically populates the **Standard Eligibility Determination** field with one of the following outcomes:
 - a. SPG IV-E Eligible
 - b. SPG State Eligible
 - c. Not Eligible
21. Verify that the **Standard Eligibility Determination** field reflects the expected outcome based on the information entered.
22. Update the **Eligibility Status** field to **Determined** and save the record. A task is automatically triggered for the Permanency Specialist to submit the record for supervisor approval.
23. Click **Save**. The record is saved.
24. Click the **Submit for Approval** button. The Submit for Approval pop-up displays. Enter comments and Click **Submit**.
Note: The Eligibility Review Record must be approved before proceeding with the Case Agreement Review.

Lesson 2: Review and Add Case Agreement

Learning Objectives:

- Create a Case Agreement Review Record
- Add a Case Agreement

Task 1: Create Case Agreement Review Record

1. Navigate back to the SPG Case Agreement.
2. Select the **Case Agreement** hyperlink. The **Case Agreement Details** page displays.
3. Click the **Agreement Review** hyperlink. The **Agreement Review Record** screen displays.
4. Enter the date in the **Date Case Agreement Reviewed** field.
5. Click the **Revised Agreement** field and select *Yes*.
6. Enter the date in the **New Agreement Due Date** field.
7. Enter the appropriate date in the **Next Review Due Date** field if applicable.
8. Enter the appropriate date in the **First Request Mail Date** field if applicable.
9. Enter the appropriate date in the **Second Request Mail Date** field if applicable.
10. Enter the appropriate date in the **Date Agreement Sent to Parent/Guardian** field if applicable.
11. Enter the appropriate date in the **Date Appeal Rights and Notification Sent** field if applicable.
12. Enter the appropriate date in the **Date Agreement Received** field if applicable.
13. Click the **Subsidy Review Type** field and select *Periodic Review*.
The other Subsidy Review Type options are:
 - Modification
 - Review of Eligibility for children 18 and over
 - Termination
14. Click the **Subsidy Review Reason** field and select *Guardian Request Continuation of the Subsidy*.
Note: The **Subsidy Review Reason** field does not display when a Subsidy Review Type of Review of Eligibility for children 18 and over is selected.
15. Click the **Approver Action Status** field and select *Sent to Final Approver*.
16. Click the **Supervisor** field and enter Adoption/SPG Subsidy Supervisor.
17. Click the **Submit for Approval** button.
Note: This auto-creates a new SPG Case Agreement Record

Task 2: Add Case Agreement

Now let's add a new SPG agreement between DCS and Jaylen Rush####'s Permanent Guardian

1. Log in as a **Subsidy Specialist** and from the Home dropdown, click the **Cases** tab. The **Recently Viewed Cases** screen displays.
2. Click the desired **Guardianship Case ID**. The case record displays.
3. Click the **Case Agreements** hyperlink from the **Related List Quick Links** section. The Cases Agreements List View displays details such as the Case Agreement ID, Agreement Type, Agreement Start Date, and Last Modified Date.
4. Select the newly created **Case Agreement** that you completed in Task .
5. Click the **Case Person ID** field and enter *Jaylen Rush####*.
6. Click the **Rate Type** dropdown and select the rate type. The options from the dropdown are:
 - Extraordinary 1
 - Extraordinary 2
 - Extraordinary 3
 - Regular 0-11
 - Regular 12-20
 - Special Circumstances Rate 0-11
 - Special Circumstances Rate 12-20
7. Click the **Rate Schedule** dropdown and select the required option. The options in the dropdown are:
 - Current Rate Schedule
 - Rate schedule from the most recent Finalized Case Agreement.

Note: C-FIRST! will default this field to Rate schedule from the most recent Finalized Case Agreement, but it is editable.
8. The default value in the **Agreement Status** dropdown is *Pending*. The other options in the dropdown are:
 - Abridged
 - Completed
 - Finalized
 - Withdrawn
9. Enter the **Agreement Start Date**.
10. Enter the **Agreement End Date**.
11. Select the **Contract Cost Limit**.

12. Enter the **Eligibility End Date**.
13. Scroll down to the **Provider Information** section.
14. Click the **Last Name/Organization Name** field and enter the required provider name.
15. Click the **Approver Action Status** field and select *Sent to Final Approver*.
16. Click the **Supervisor** field and enter *Adoption/SPG Subsidy Supervisor*.
17. Click **Save**. The record is saved and the **SPG Agreement** screen displays.
18. Click the **Submit for Approval** button.



System Tip!

- C-FIRST! does not let you complete Case Agreement prior to eligibility determination.
- Case Agreement End Date must be the youth's 18th birthday for IV-E funded SPG Case Agreements.
- For state funded subsidy records, the Agreement End Date cannot be greater than the first day of the 12th month (1 year) or 24th month (2 years) after the Contract Begin Date or the day of the youth's 18th birthday, whichever is sooner.
- There cannot be two active finalized Case Agreements with overlapping start and end dates.

Module 7: Supervisory-Specific Functions

Permanency Specialist Supervisors approve submitted plans and other areas. They also pull reports from Tableau.

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

- Approve a Submitted Plan
- Reject and Reassign Submitted Plans
- Access Tableau to pull reports

Lesson 1: Supervisory Functions

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

Learning Objectives

- Approve a submitted record from the Items to Approve dashboard or Bell Notification
- Reject a submitted record and provide required comments
- Reassign a submitted record to another user

Task 1: Approve a Submitted Plan

You also received the Individualized Recruitment Plan submission for Jaylen Rush#### and Aaliyah Rush####. After reviewing the plan details, approve the record.

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



Process Tip!

After approval, the owner of the record receives a bell notification confirming that the record was approved. C-FIRST!

also updates the **Approval History** list view with the step name, date, status, and any comments entered.

Task 2: Reject a Submitted Plan

As a Child Program Supervisor, you received an Individualized Recruitment Plan submission for the Rush#### Case. After reviewing the plan, return it to the caseworker for edits.

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



Process Tip!

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

Task 3: Reassign a Submitted Plan to Another User

Now, you have received an Individualized Recruitment Plan submission for the Rush#### Case but need another supervisor to review it. Reassign the approval to a different user.

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

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



System Tip!

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

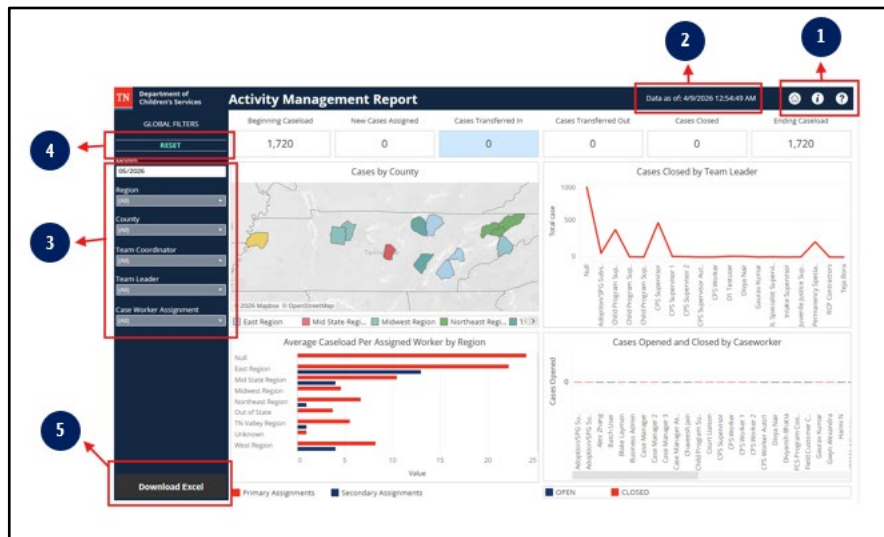


Process Tip!

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

Lesson 2: Access Tableau

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



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'll 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.

To log in to Tableau,

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

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.

The screenshot shows the 'Intake Report' dashboard. On the left, under 'GLOBAL FILTERS', the 'Region' filter is set to 'Midwest Region'. The main table displays intake data for this region. The table has columns: Region, Supervisor, Initial Intake Worker, Intake Worker Disposition Track, Intake Worker Disposition Priority, County, and ZIP Code. The data is filtered to show only records where the Region is '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	SU INVESTIGATION	Null	Carroll	Null
Midwest Region	Cps Supervisor	NS1 Testuser	Null	Null	Benton	Null
Midwest Region	Cps Supervisor	NS1 Testuser	Null	Null	Benton	38464
Midwest Region	Cps Supervisor	NS1 Testuser	Null	Null	Benton	38464
Midwest Region	Cps Supervisor	NS1 Testuser	Null	Null	Benton	96543
Midwest Region	Cps Supervisor	NS1 Testuser	Null	Null	Cheatham	38464
Midwest Region	Cps Supervisor	NS1 Testuser	Null	PRIORITY 1	Carroll	38464
Midwest Region	Cps Supervisor	NS1 Testuser	OUT OF STATE COURTESY	Null	Decatur	38464
Midwest Region	Cps Supervisor	NS2 Testuser	Null	Null	Benton	Null
Midwest Region	Cps Supervisor	NS2 Testuser	Null	Null	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

3. 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.

GLOBAL FILTERS		Intake Report						
RESET		Region	Supervisor	Initial Intake Worker	Intake Worker Disposition Track	Intake Worker Disposition Priority	County	ZIP Code
Start Date	End Date	Midwest Region	Null	Intake Supervisor	Null	Null	Blount	Null
06/02/2026	06/03/2026	Midwest Region	Null	Ns2 Testuser	Null	Null	Anderson	38464
Region		Midwest Region	Child Program Super.	Gaurav Kumar	Null	Null	Dickson	38012
Midwest Region		Midwest Region	CPS Supervisor	Intake Supervisor	Null	Null	Bedford	Null
County		Midwest Region	CPS Supervisor	Intake Supervisor	Null	Null	Blount	Null
(All)		Midwest Region	Cps Supervisor	Gaurav Kumar	Null	Null	Carroll	99999
☒ Anderson		Midwest Region	Cps Supervisor	Gaurav Kumar	Null	Null	Chester	Null
☒ Bedford		Midwest Region	Cps Supervisor	Intake Supervisor	Null	Null	Benton	Null
☒ Benton		Midwest Region	Cps Supervisor	Intake Supervisor	Null	Null	Benton	Null
☒ Blount		Midwest Region	Cps Supervisor	Intake Supervisor	Null	Null	Chester	38464
☒ Carroll		Midwest Region	Cps Supervisor	Intake Supervisor	OUT OF STATE COURTESY	Null	Benton	Null
☒ Cheatham		Midwest Region	Cps Supervisor	Intake Supervisor	SIU INVESTIGATION	Null	Carroll	Null
☒ Chester		Midwest Region	Cps Supervisor	Ns1 Testuser	Null	Null	Benton	Null
☒ Decatur		Midwest Region	Cps Supervisor	Ns1 Testuser	Null	Null	Benton	38464
☒ Dickson		Midwest Region	Cps Supervisor	Ns1 Testuser	Null	Null	Benton	38464
Download Excel		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	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

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

Task 3: Downloading a Report

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

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

Download Crosstab

Select a sheet from this dashboard

☒

Activity Management Table

☐

Average Caseload Per Assigned Worker by Region

Select Format

☒ Excel

☐ CSV

Download

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

Knowledge Check!

Question 1: Where can a supervisor find records that need to be approved?

- A. Provider Tab
- B. Items to Approve Dashboard (Task) or Bell Notification
- C. Case Agreements
- D. Eligibility Tab

Question 2: What must a Supervisor do when rejecting a submitted plan?

- A. Leave the comments blank
- B. Delete the plan
- C. Enter the comments explaining why it is being returned
- D. Approve it first

Question 3: What field is required when reassigning a submitted plan to another user?

- A. Approval Status
- B. Reassign To
- C. Provider Name
- D. Rate

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.
C-FIRST!	This refers to Tennessee's new Child Welfare platform built on Salesforce. C-FIRST! stands for Child and Family Information Records System Tracking.
CCWIS	This refers to the project, Comprehensive Child Welfare Information System, which is working towards delivering a modernized child welfare system.
CSEM	This refers to Commercially Sexually Exploited Minor victim.
Field	A part of an object that holds a specific piece of information, such as text or a number.
IRP	The Individual Recruitment Plan (IRP) captures the steps taken by users to find a permanent family for a child in foster care.
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
Navigation Bar	The horizontal menu at the top of the C-FIRST! interface with quick access to Home, Cases, Persons, Providers, and Reports.
Personal Identification Number (PID)	Personal Identification number which is a unique identifier automatically assigned to each person record in C-FIRST!
Related List	This refers to the section on a C-FIRST! record page that displays associated like Persons Involved, Court Orders, Placements, Case Documentation, and Staff Involved.
Services Referral	A request to connect an individual or family to a service or provider that can meet an identified need.
TPR	Termination of Parental Rights (Petition or Court Order) to terminate the legal rights of a parent or parents over their Child.
Treatment Case	The primary case management record in C-FIRST! for children and families across all programs. It is used to document and manage contacts, assessments, permanency plans, meetings, placements, court activity, and other casework. It can also link to a Permanency Case while remaining the family's central record.
Utility Bar	A toolbar at the top of the C-FIRST! interface with quick access to help resources, user information etc.
Worklisted	Task status indicating you have been assigned a task to complete.