



C-FIRST! Training

Relative Caregiver Program Learner Guide

Tennessee Department of Children's Services



Relative Caregiver Program (RCP)

Course Learner Agenda

Day 1

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Afternoon Break

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Introduction

Welcome to State of Tennessee Department of Children's Services (DCS) C-FIRST! **Relative Caregiver Program (RCP) Course**. We are excited to have you here with us! As you have 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 person searches, treatment cases, case documentation, service agreements, and stipends. 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

The Relative Caregiver Program (RCP) is an option available for relatives to care for non-custodial children who require care outside of their biological parents. Through the RCP, children and relative caregivers receive supportive services geared toward prevention and maintaining the child to stay within the family instead of entering foster care. The family has access to several opportunities to support them, and potentially a monthly stipend for those who qualify for this program.

With C-FIRST! the RCP delivers information, referrals, support groups or financial assistance to the relative caregiver.

The criteria for the RCP eligibility are:

1. The relative caregiver must be related to the child by blood, marriage, or adoption.
2. The relative caregiver must have primary care and control of the child through power of attorney or through legal custody.
3. The birth parent(s) must not reside in the caregiver's home.
4. The child cannot be 18 or older and be eligible for the RCP.

In addition to the standard RCP eligibility criteria, additional criteria apply to qualify for a monthly stipend:

1. A custody order signed by the court.
2. The caregiver is 21 years of age or older.
3. The relative caregiver agrees to cooperate with DHS for any matters regarding child support.

Case Scenario: The Stillman Family

The Stillman household, which consists of Emily and her son, Jason, have come to the attention of the Tennessee Department of Children's Services (DCS) due to serious concerns about caregiver alcohol misuse and escalating domestic violence. While these risk factors present significant challenges, you will also see protective factors at play: Emily's cooperation with DCS staff, Jason's strong school connection, and support from extended family.

What to Expect

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

1. Navigating the C-FIRST! homepage and performing general navigation tasks
2. Completing person searches, viewing person records, creating person records
3. Creating treatment cases and updating Relative Caregiver Program (RCP) records, completing needs assessments
4. Performing case documentation and conferencing tasks
5. Creating service agreements, calculating eligibility, performing eligibility overrides and viewing payment history

Your Role

You will be responsible for completing all tasks in this course. You will take on other worker roles to complete the lessons in this course that include performing person searches, viewing person records, creating treatment cases, adding RCP program records, updating contacts, creating tasks, processing service agreements, stipends, and eligibility information.

Course Objectives

After completing this course, you will be able to:

- Explain how to navigate the different sections of the C-FIRST!
Homepage
- Provide an overview of a Treatment Case and its features
- Add a person in C-FIRST! and create a Stipend RCP

- Complete the Case documentation and conferencing for the Case
- Create, review, and manage Case agreements
- Process and manage stipend payments

Icons Used Throughout the Course

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

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

Module 1: General Navigation

Lesson 1: C-FIRST! Fundamentals & Navigation

This lesson introduces the C-FIRST! dashboard **Homepage**, including its buttons and icons. Learners will learn to navigate the dashboard and Case screen components.

The first step in using C-FIRST! is to log in. To log into C-FIRST!, users must be connected to the internet. Next, staff members open C-FIRST! through a valid web browser. Use the individually assigned User ID and Password information to login to the C-FIRST! Training Environment.

Please only use your assigned User ID throughout the duration of this course. Also note, the security settings for each user will mimic the specific system functionality and access associated to you within C-FIRST!.

Note: All information and data presented throughout this environment is specially created for training purposes and does not contain Personal Identifiable Information (PII) or Protected Health Information (PHI).

Learning Objectives

- Log into C-FIRST! and identify Homepage components
- 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

Task 1: Log into the Dashboard and Locate Key Features

1. Log into the C-FIRST! Training Environment as a **Kinship worker** using the link, username, and password provided by the C-FIRST! team.
2. Select the **Accept** radio option to confirm acknowledgement of the disclaimer message, then click **Login**. The **Homepage** displays. The **Homepage** has the following widgets:
 - **Items to Approve:** This widget displays a list of the items assigned to the logged-in user. It includes information on what the item is and who submitted it for approval.

In the C-FIRST! **Homepage** dashboard, users have access to the following features:

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

- **Add Favorite Icon:** This is used to bookmark or add favorite screens, for users to jump to or view the screens.
 - **Global Actions Icon:** This is used to create a **New Task, Event, Note, Person** or to **Log a Call** and **Email**.
 - **Guidance Center:** This is a go-to resource for any help needed and provides the users with relevant articles and/or 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. The **Home** dropdown lists the various tabs available to the logged in user's role.
 - All Persons
 - Birthdays This Month
 - New This Week
 - Recently Viewed Person
3. Click the **Push pin** icon to set the screen as a default list view.

Task 2: Manage Notifications

1. Login to C-FIRST! and from the **Homepage** click the **bell** (Notifications) icon. The notification tray displays notifications from the last 30 days.
2. Click the desired **Notification** based on your activity and navigate the task. The task opens on a new screen.
3. Click the **Case ID** hyperlink in the **Navigational Links** section to review and act on the task as requested.

Task 3: Search for a Case/Person/Record

1. Click the **Global Search Bar** from the **Homepage**. The search dialog box opens, providing suggested searches and record previews based on recently viewed Records and searches.
2. Enter a name or number in the search bar, to search for an item not displayed in the preview. The search result is narrowed down by the name or number.
3. Hover over the record to get a quick view of the item. The quick view of the item is displayed on the right side of the search preview.

4. Click the record to open the item.

Knowledge Check!

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

- A. The App Launcher is used to bookmark favorite screens for quick access.
- B. The Global Search Bar enables users to search for Records across multiple objects, including Intake Records, Cases, and persons.
- C. The Today's Tasks widget displays items needing approval from the logged in user.
- D. The Guidance Center displays the user's profile details, Settings, Username, and Display Density.

Lesson 2: Person Management

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

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).

The **Case Person** serves as a link of an individual's Person record to a specific Case. Case Person is listed on the Case's related list. 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
- 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.

Learning Objectives

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

Task 1: Search for Existing Person

Complete the following steps to accomplish this task.

1. From the **Homepage**, click the **Persons** tab. The **Recently Viewed** list view displays.
2. Click the **New** button located in the upper right. The **Search for a Person** screen opens.

3. Click the **Last Name** field and enter *last name####*.
4. Click the **First Name** field and enter *first name####*.
5. Click the **Search** button. C-FIRST! executes the search and displays matching results in the **Search Results** section.
6. Review the search results list for potential matches. Each result displays the person's name, date of birth, and SSN (last four digits).

Note: While on the Search Results screen, you can use the Clear button to reset your search results.

7. From the search results, click the **dropdown arrow** at the end of the row and select *View*. The **Person Detail** screen displays.

Note: To associate the person to a case, select *Associate* from the dropdown instead of *View*.



System Tip!

Only a Person record with the PID generated can be associated to the Case.

Task 2: Perform a Search That Returns No Results

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

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

Note: When no matches are found, you must create a new Person Record to add this individual to the Case.

Task 3: Create a Person Type Record

When the family arrives at the County office and requests RCP services, the Kinship Worker creates the Jason, the child and related family members in the system.

1. Click the **Person** tab from the **Home** dropdown. The **Recently Viewed Persons list view** displays the list of Persons in C-FIRST! including details like Name, PID, Gender Identity/Expression, Gender at Birth, Age, Custody Status and Ethnicity.
2. Click **New** to add the child as a Person. The **Search for a Person** pop-up displays.
3. Click the **First Name** and **Last Name** fields and enter the name of child/youth to search for a duplicate record.
4. Click **Search**. The search generates a list of approximate matches. If a matching record displays, click the **Person Name** hyperlink to open the Person Record.
5. Click **New Person**. The **New Person** pop-up displays. Enter the mandatory details into the sections to create a new Person.
6. Click the **Gender at Birth** dropdown and select the appropriate option.
7. Click the **Date of Birth Unknown** dropdown and select the appropriate option.
8. Enter the **Date of Birth**.
9. Click the **Ethnicity** dropdown and select **Hispanic or Latino**. The options in the dropdown are:
 - Hispanic or Latino
 - Not Hispanic or Latino
 - Unable to Determine
10. Click the **Race** field, then click the right arrow icon to select an option from the **Available** section. The options in the Available section are:
 - Abandoned
 - American Indian or Alaska Native
 - Asian
 - Black or African American
 - Declined
 - Native Hawaiian or Other Pacific Islander
 - White
 - Unknown
11. Click **Save**. The Person Record is created.



System Tip!

- Users can select the **Person** radio option to capture client information.
- A PID of a Person must be generated before creating a Person Type Record.
- Users can select the **Staff** radio option to capture staff information.
- Only a System Administrator, FCCR, and Volunteer Coordinator can create a Staff Record.
- The **Is Person Validated** field displays if the person has a PID and is validated in C-FIRST!.

Task 4: Generate a Person ID (PID)

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

1. On the **Person Details** screen, locate the **Generate PID** button in the action bar.
2. Click the **Generate PID** button. C-FIRST! displays a confirmation dialog. A message displays saying that a PID has been successfully generated.



System Tip!

Verified SSNs support accurate identity matching across the system and with external interfaces such as the Department of Safety and Homeland Security. If you are unable to verify the SSN during the first contact, leave the **Verified** field as *No* and document the reason in the Case notes. When a verified SSN is entered, the system can cross-reference the number against external databases to confirm the person's identity. When the **SSN Verified** field is set to *Yes*, the verification happens automatically, and the record is saved. If the verification returns a mismatch, C-FIRST! displays a warning message. If you receive a verification mismatch, contact your Kinship Coordinator.

Task 5: Add Person Type

After saving the person, you need to add a person type.

1. On the **Person Details** screen, click the Person Type Related List Quick Link.
2. On the **Person Type Related** screen, click New.

3. Select the Person radio button.
4. Click Next.
5. Click the **Status** dropdown, select *Active*.
6. Click the **Human Trafficking Survivor?** dropdown, make the appropriate selection.
7. Click the **Living Arrangement** dropdown, make the appropriate selection.
8. Click the **Tribal Affiliation** dropdown, make the appropriate selection.
9. Click the **Child Ever Fathered/Born Children?** dropdown and make the appropriate selection.
10. Click the **Has the Child Ever Been Adopted?** dropdown and make the appropriate selection.
11. Select Save.

Task 6: Update Demographic Information for a Household Member

During your conversation, Jason Stillman advised that he preferred to be called James. You need to update his Person Record with this information.

1. Locate the demographic information you need to update from the **Person Details** screen.
2. Click the **Alias/Other Name** hyperlink in the **Related List Quick Links** section. C-FIRST! displays the **Alias/Other Name** related list.
3. Click **New**. C-FIRST! opens the **New Alias/Other Name** screen.
4. Click the **First Name** field and enter *first name####*.
5. Click the **Status** dropdown and select *Active*.
6. Click **Save**. C-FIRST! saves the alias record.



System Tip!

Attachments uploaded to a person record are accessible from any case the person is associated with. Use person-level attachments for photos and documents that identify or characterize the individual. Use case-level attachments for verification items making them eligible for the program, like court orders in which the caregiver was deemed eligible.

Knowledge Check!

Question 1: Which of the following conditions should be met before adding a Person record to the Case?

- A. Person record with photo
- B. Person record with PID generated
- C. Person record with Person Type record
- D. Person record with one Criminal History Background Check

Question 2: Why is it important to search for existing person records before creating a new one in C-FIRST!?

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

Question 3: After saving the Person Record, how can users create a PID?

- A. It is auto created on creation of the Person Record
- B. Clicking the Person Type Record
- C. Clicking Clone
- D. Clicking Generate PID

Lesson 3: RCP Eligibility & Waitlists

In this lesson, users will learn how to calculate program eligibility and add a child to the RCP program-related waitlist.

Learning Objectives

- Determine and Calculate Eligibility
- Correct Eligibility with Supervisor Override Capability
- Understand Rate Amount on the RCP Case Agreement
- Add a child to the RCP program-related waitlist

Task 1: Determine and Calculate Eligibility

1. Log in as the RCP Worker/Max Specialist and click the **Cases** tab from the **Home** dropdown.
2. Click the required **Treatment Case ID**. The Case Record displays.
3. Click the **Persons** hyperlink from the **Related List Quick Links** section.
4. Click the required **Case Person ID**.
5. Click the **Person** hyperlink.
6. Click the **Eligibility** hyperlink from the **Related List Quick Links** section.
7. Click the **Relative Caregiver Program Eligibility** radio button.
8. Click **Next**. The **New Eligibility: Relative Caregiver Program Eligibility** screen displays.
9. Fill out the required fields including adding the **Approver** field.
10. Click **Calculate Eligibility** to determine the eligibility of the youth for RCP subsidy. The calculation is done successfully.
11. Click the **Submit for Approval** button.

Note: If the person is determined eligible, an RCP waitlist intake record will be created automatically for them.

Task 2: Correct Eligibility with Supervisor Override Capability

If the information entered in the RCP Eligibility Record is incorrect or has been changed, the RCP Worker will need to correct and calculate the eligibility again. Once the RCP Worker starts the process, the **Eligibility Status** of the existing record will be auto updated to *Modified* and will remain noneditable. A clone of the Record is created

with the **Eligibility Status** as *Pending* for the RCP Worker to make any changes needed. Once the changes are complete and verified, the RCP Worker will calculate eligibility.

1. Login as the RCP Supervisor and from the **Home** dropdown, click the **Cases** tab.
2. Click the required **Treatment Case ID**.
3. Click the **Persons** hyperlink from the **Related List Quick Links** section.
4. Click the required **Case Person ID**.
5. Click the **Person** hyperlink.
6. Click the **Eligibility** hyperlink from the **Related List Quick Links** section.
7. Click **Correct Eligibility** to clone the Record. The new Record displays with the **Eligibility Status** as *Pending*.
8. Scroll down to the **Relative Caregiver Determination** section.
9. Click the **pencil** icon beside the **Override Determination** field. The fields become editable.
10. Click the **Override Determination** dropdown and select the required option. The options in the dropdown are:
 - *Eligible*
 - *No Determination Made*
 - *Not Eligible*

Note: The **Override Reason** field displays once an option is selected from the **Override Determination** dropdown.
11. Click the **Override Reason** dropdown and select the required reason. The options in the dropdown are:
 - *Eligibility Determined in Error*
 - *Other*
 - *Yearly*
12. Click the **Court Order Uploaded?** dropdown and select if a court order supporting the override decision has been uploaded.
13. Click the **Notes** field and enter the details regarding the override decision.
14. Click **Save**. The eligibility decision is corrected and overridden.

Task 3: Understand Rate Amount on the RCP Case Agreement

The rate amount on the RCP Case Agreement is populated from the Rate Maintenance table of the Service Taxonomy record that is linked on the Case Agreement.

Note: When the child has a birthday that changes the rate, it will be automatically done by the system, and a new agreement is not required.

Payments for finalized RCP Case Agreements are executed monthly to ensure relative caregivers receive timely financial support. The RCP Case Agreement selection criteria is based on the following items:

- Case Status is not Abridged
- Case Agreement Type is Relative Caregiver Program Subsidy
- Case Agreement Status is Finalized

Task 4: Add a Child to the RCP Program-related Waitlist

A child is added to a waitlist upon being determined program eligible.

1. Click the **Persons** hyperlink from the **Related List Quick Links** section.
2. Click the required **Case Person ID**.
3. Click the **Person** hyperlink.
4. Click the **Eligibility** hyperlink from the **Related List Quick Links** section.
5. Click into the **Eligibility Record** hyperlink.
6. Click into the **RCP Waitlist Intake** hyperlink from the **Related List Quick Links** section.
7. Click **New**. The **New RCP Waitlist Intake** screen displays.
8. Click the **Date of Inquiry** field and enter the *date of inquiry*.
9. Click the **Provider** field and enter the *provider*.
10. Click the **Caregiver** field and enter the *caregiver*.
11. Click the **Waitlist Type** field and select the *type*.
Note: This field will be auto populated from the **Eligibility** record.
12. Click the **Waitlist Status** field and select the status.
Note: Once the Waitlist Position is 0 and interest is confirmed, then the status can be updated to Admitted to the Program.
Note: For Services only, a worker can enter the **Skip Waitlist Position** to move the youth up the waitlist. They will then need

to respond *Yes* to the **Skip Waitlist Justification** drop-down if they do this.

13. Click the **Date Added to Waitlist** field and select the *Date*.

Knowledge Check!

Question 1: Once the eligibility correction process starts, the existing eligibility record's status is auto updated to *Modified* and becomes noneditable.

- A. True
- B. False

Lesson 4: Overview of a Treatment Case

A Treatment Case captures the work done by DCS and, in this case, Contracted Private Provider Staff 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. A Treatment Case can also be created on a Family Investigation Disposition where **Final Disposition** is selected as *Refer to Treatment*.

Learning Objectives

- Demonstrate basic navigation skills for the Treatment Case
- Locate Case information
- Access and attach Case documents

Task 1: Create a Treatment Case

1. Login as the **Kinship worker** and from the **Home** dropdown, click the **Person** tab. The **Recently Viewed** list view displays.
2. Click the desired Person Record by clicking on the **hyperlink** in the **Name** column.
3. Click the **Cases** hyperlink from the **Related List Quick Links** section. The Cases list view displays a list of Cases associated to the Person.



System Tip!

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

4. Click **New Case** button on the right side of the screen to create a new Case Record. The **Case Edit** screen opens in a new tab.
5. Click the **Case Type** dropdown and select **Treatment**. The **Case Open Date** and **Case Status** are auto populated.

Note: If the Provider has no available slots, you can now add the person to a waitlist. Once a slot becomes available, you will receive a notification and can create the necessary program for the person whether they are requesting a stipend or a service.

6. Enter relevant details in the **Assigned To, Region** and **County** fields.
7. Click **Save**. A new Case is created.

Task 2: 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 apart from the Recently Viewed list view:
 - Adoption Cases
 - All
 - Bright Futures Cases
 - Interstate Compact for the Placement of Children (ICPC) IC Request Receive
 - Investigation
 - My Open Cases
 - Permanency Cases
 - Permanent Guardianship Cases
 - Recently Viewed (Pinned list)
 - Treatment Cases
 - IC Administrative – (Interstate Compact on Adoption and Medical Assistance) ICAMA Cases
 - IC Administrative – ICPC Cases

- My Primary Assigned Cases
 - Safe Haven 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 with sub-category as Relative Caregiver.
 - **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 Cases 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 an AI-generated visual timeline about the person and Theme. The interactive chart has clickable data points that open a panel to the right with detailed information. 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, Behavioural and Social Development, Family Dynamics, Services and Support, Crisis and Urgency etc.

Note: To close the Treatment Case, in the **Closure Recommendation** section of the **Case Information** tab, populate the **Closure Type** field and save the Record. If there are any conditions that are not met for closure, C-FIRST! will notify the user of validation rules. Once validations have been addressed, the Case Record can be saved.

After saving the Record, the **Closure Type** field will be populated in the forwarded **Closure Disposition** section, and a Disposition Task is worklisted to the user's Supervisor. The Supervisor then reviews the Closure Recommendation and updates the fields in the **Closure Disposition** section as needed. To close the Case, the supervisor updates the Final Case Disposition to close the Case by clicking **Complete Disposition**.

Task 3: Create an RCP Program Record

Upon creation of a Treatment Case, C-FIRST! generates a task for the Kinship worker to add the Relative Caregiver Program to the Case. The worker can use the generated task to access the treatment case.

1. From the **Home** dropdown, click the **Cases** tab. The **Recently Viewed** list view displays.
2. Click the required **Treatment Case ID**. The Case Record displays.
3. Click the **Programs** hyperlink from the **Related List Quick Links** section.
4. Click **New** to create a new Program for the Case.
5. Click the **Referral Source** dropdown and select a source for the referral. The dropdown has the following options:
 - Court
 - CPS
 - JJ
 - Social Services
 - Walk-In
6. Click the **Case Person** field and enter the child/youth's name.
7. Click the **Program Type** dropdown and select *RCP (Stipend)*. The other options in the dropdown are:
 - Custodial D/N, Unruly
 - Custodial JJ
 - FCIP
 - FSS
 - ICJ Incoming
 - Independent Living
 - Non-Custodial JJ
 - Predisposition/Order of Reference
 - RCP (Stipend)
 - RCP (Non-Stipend)
8. Click the **Program Status** dropdown and select *Pending*. The options in the dropdown are:
 - Active
 - Closed
 - ICPC Incoming
 - Pending



System Tip!

A **Needs Assessment** task is created by C-FIRST! once the Program Status is set to *Active*.

9. Click the **Program Start Date** field and enter the start date.
Note: Users must populate the **Program End Date**, **Program Closure Reason**, and **Program Closure Summary** fields when the Program Status is updated to Completed.
10. Click the **Assignee** field and enter the name of the worker.
11. Click the **Supervisor** field and enter the name of the supervisor.
12. Click **Save** to create a new Program.

Task 4: Assign the Program to an RCP Contractor

1. Login as the **RCP Supervisor** and navigate to your case.
2. Click the **Program** hyperlink from the **Related List Quick Links** section. The Programs list view displays.
3. Click the **hyperlink** in the **Program ID** column to open the Program Record.
4. Click the **Assignee** field and enter the name of the assigned RCP Worker.
5. Click the **Supervisor** field and enter the name of the supervisor.
6. Click **Save** to assign the program to the Assignee.

Task 5: Complete Needs Assessment Task

Once the **Program Status** is set to *Active*, a Needs Assessment task is automatically created and worklisted to the assigned RCP Worker.

1. Login as the **RCP Worker** and from the **Homepage** click the **bell** icon.
2. Click the **Complete Needs Assessment** task.
3. The **Task Details** screen displays the details about the task information. Complete the task outside of C-FIRST!.
4. Click **Mark Complete** on the task once the assessment is done. The **Status** changes to *Completed*.

5. Click **Create Follow-Up** to create a task for any follow-up items.

Task 6: Access (and Attach) Supporting Documents

1. Navigate to the Case Record and scroll down to the bottom of the **Case** screen.
2. Click the **Attachments** tab. The tab displays the list of all attachments associated with the Case.
3. Click **Basic File Upload**. The **Upload File** pop-up displays.
4. Click the **Document Date** field and enter the document's date.
5. Click the **Document Category** dropdown and select *Legal Documents*.
6. Click **Upload Files** or drag and drop the documents to upload the document.
7. Click the **Document Name** field and enter the document's name.
8. Click **Person Association**, then click the **right arrow** icon to move the person's name from the **Available** section to the selected list.
9. Click the **Comments** field and enter the appropriate comments.
10. Click **Save**. The attachment is uploaded successfully.
11. Click the **Attachments** tab. The attachment is now visible.
12. Select the files in the **File Name** column, then click **Download Files**. To download a single file, click **Download** in the file row.

Knowledge Check!

Question 1: What information does the Case Summary section display?

- A. Only court hearing dates
- B. A manual narrative entered by the assigned worker only
- C. An AI generated summary highlighting creation circumstances and recent developments
- D. Only the Case status history

Question 2: The hyperlinks in the Related List Quick Links section provides access to case related activities without having to leave the main case screen.

- A. True
- B. False

Lesson 5: Case Documentation & Conferencing

This lesson covers how to document Case activities including contacts and visits, record CFTM details, attach supporting files, create and manage tasks. Users can record interactions between Case Persons/Collateral Persons and DCS employees by creating a Case Documentation record and include details like assigned users, Case collaterals, contact dates, takeaways from the interaction etc.

Learning Objectives

- Create a Case Documentation Record
- Create a Case Conference Record
- Create a Task Manually

Task 1: Record the Contacts and Visit

1. Click the **Home** dropdown on the **Homepage**, then select *Cases*.
2. Click the relevant Case from the **Case ID** column.
3. Click the **Case Documentation** hyperlink in the **Related List Quick Links** section. The **Case Documentation** screen displays. The **Case Documentation** list view includes details such as Documentation ID, Documentation Type,

Documentation Status, Date of Occurrence, Method, Assigned Users, Created By, Provider Portal Source, Children, and Person Involved.

4. Click **New** to create a new Case Documentation. This **New Case Documentation** screen displays.
5. Click the **Documentation Type** dropdown and click the **right arrow** icon to select *Child Contact* from the Available section.
6. Click the **Method** dropdown and select *Face to Face*.
7. Enter the **Date of Occurrence**.
8. Click the **Duration of Contact** dropdown and select *15 Minutes*.
9. Click the **Documentation Notes** field and enter *Face to face with child at home*. The default status of the **Documentation Status** dropdown is *Pending*.
10. Click the **Location** dropdown and select *Family Home*.
11. Click **Save** or **Save & New** to complete saving the Case Documentation Record. The **Case Documentation** screen includes the following Related Lists:
 - **Person Involved:** Allows the user to associate a Person Involved who is a Case Person to a Case Documentation record. **Children:** Allows the user to associate a child who is a Case Person to a Case Documentation Record.
 - **Collaterals Involved:** Allows the user to associate Collaterals to a Case Documentation Record.
 - **Staff Involved:** Allows the user to associate staff involved to a Case Documentation Record.

Step 1: Associate a Person Involved to the Case Documentation record

1. On the **Case Document** screen, click **New Person** on the **Person Involved** List View. C-FIRST! displays a selection dialog.
2. Select or search for the desired Case Person on the selection dialog.
3. Click **Next**. C-FIRST! displays the **New Person Involved** screen.

4. Locate the **Case Person ID** field on the **New Person Involved** screen. This lookup field links the Person Involved record to a Case Person.
5. Review the **Name** field. C-FIRST! auto populates this field based on the selected **Case Person ID** value.
6. Review the **Role** field. C-FIRST! auto populates this field from the Case Person record.
7. Click **Save**. C-FIRST! saves the record and displays the **Person Involved Detail** screen for the newly created record.

**System Tip!**

The **Name** and **Role** fields are formula fields. C-FIRST! populates them automatically from the Case Person record. You cannot edit these fields.

Step 2: Add Persons and Collaterals to a Case Documentation Record

1. Navigate to the **Case Documentation** screen. Click the **Add Persons/Collaterals** button on the **Case Documentation** detail screen. C-FIRST! displays the **Add Persons/Collaterals** pop-up.
2. Review the list of active Case Persons and Collaterals available for selection.
3. Select the check box for Case Persons and Collaterals to add to the record.
4. Click **Save**. C-FIRST! returns to the **Case Documentation** detail screen.

**System Tip!**

C-FIRST! automatically sorts persons based on their Case role. Case Persons with a role of *Child/Youth* are added to the **Children** related list. All other Case Persons are added to the **Person Involved** related list. Selected Collaterals are added to the **Collaterals Involved** related list.

Step 3: Associate a Staff Involved to the Case

Documentation record

1. On the **Case Documentation** screen, click the **Staff Involved Related** List Quick Links, then select **New**.
2. On the **New Staff Involved** pop-up, look up and select the staff member in the **Staff Name** field.
3. Enter the agency name in the **Agency** field, if known.
4. Click **Save**. C-FIRST! displays the **Staff Involved** detail screen.



Process Tip!

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

Task 2: Create a Case Conference with DCS Staff

Case Conferences are meetings to plan the next steps, ensure safety and well-being, monitor progress, and provide guidance and support. These meetings are held between RCP Provider staff; their supervisor and Kinship Coordination staff contacts relevant to this specific case.

1. Click the **Home** dropdown on the **Homepage** and select **Cases**.
2. Click the relevant Case from the **Case ID** column.
3. Click the **Case Conferences** hyperlink in the **Related List Quick Links** section. The **Case Conferences** screen displays. The **Case Conferences** list view includes the details like Case Conference ID, Case Conference Type, Case Conference Date/Time, and Case Conference Status.
4. Click **New** to create a new Case Conference.
5. Select from the following types of Case Conference types:
 - **Supervisor/Worker Permanency Case Conference:**
Captures Permanency Case Conference details (not relevant for RCP).
 - **Supervisor/Worker Treatment Case Conference:**
Captures Treatment Case Conference details, used for Provider worker and Supervisor to document reviews of cases within the program.

- **Supporting Case Conference:** Captures Supporting Case Conference details used when consulting with the Kinship Coordination staff or other professionals to assist the family with services.
6. Click the **Supervisor/Worker Treatment Case Conference** radio option, then click **Next**. The **New Case Conference: Supervisor/Worker Treatment Case Conference** pop-up displays.
 7. Click the **Case Conference Date** field and enter *the date*.
 8. Click the **Discoverable?** dropdown and select *Yes*.
 9. The default status of the **Case Conference Status** dropdown is *Pending*.
 10. Click the **Ongoing Family Assessment** field and enter the required notes.
 11. Click the **Historical Assessment** field and enter the required notes.
 12. Click the **Human Trafficking?** dropdown and select if the victim is a human trafficking victim.
 13. Click the **Human Trafficking Description** field and enter the required notes.
 14. Click the **Permanency/Case Planning** field and enter the required notes.
 15. Click the **Assessment of Child Safety** field and enter the required notes.
 16. Click the **Child Well-Being** field and enter the required notes.
 17. Click the **Are Any of the Children in Custody?** dropdown and select whether any of the children are in custody.
 18. Click the **Supervisory Record Review and Next Steps** field and enter the required notes.
Note: Hover over the 'i' icon for each field to see details about the specific information or notes required.
 19. Click **Save**. The **Case Conference** is created.
 20. Click the **Pencil** icon next to a field and update information if there are updates to be made at this point.

Task 3: Create Tasks

1. From the **Homepage** click the **Home** tab.
2. Click the **View All** hyperlink in the **Today's Tasks** widget to display all tasks. The **Tasks Recently Viewed** screen displays the list of available tasks created for the user.
3. Click **New Task** to create a new task and assign it to other users. The **New Task** pop-up displays.
4. Click the **Subject** field and enter *Relative Caregiver Program Eligibility Ready for Review*.
5. Click the **Comments** field and enter *review the task*.
6. Click the **Due Date** field and enter *the date*.
7. Click the **Manual Task?** dropdown and select *Yes*.
8. Click the **Assigned To** field and enter *Relative Caregiver Supervisor*.
9. Click the **1 Total Tasks Priority** dropdown and select *Normal*.
10. Click the **Status** dropdown and select *Worklisted*.
11. Click the **Activity Type** dropdown and select *Eligibility*.
12. Click the **Name** field and enter the name of the child.
13. Click the **Case ID** field and enter the Case ID number.
14. Click **Save** or **Save & New** to complete saving the task. The Task is created.
15. Click the **Edit Task** or the **Pencil** icon in the record to edit and update the task details.
16. Click the **Create Follow-Up Task** to add a follow up task to the main task.
17. Click **Mark Complete** to mark a task record as complete.

Note: Users can reassign tasks to other users, but tasks cannot be closed in bulk. Case Managers and RCP workers are able to create tasks.

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 an audit trail of completed work.

1. On the **Task Details** screen, locate the **Status** field. C-FIRST! displays the current task status (e.g., *Pending* or *In Progress*).
2. Locate the **Mark Complete** button at the top of the task record if the task status is *In Progress*.

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.

Knowledge Check!

Question 1: When creating a Task, users can reassign tasks to other users and close the tasks in bulk.

- A. True
- B. False

Lesson 6: Case Agreements

In this lesson, users will learn how to capture the agreement details between DCS and the families in a Case Agreement Record. This will help maintain all data regarding relative caregiver subsidies, to be compliant with state and federal requirements. An Agreement Review is created 30 days before the Case Agreement End Date by C-FIRST!.

Learning Objectives

- Document relative caregiver arrangements in a Case Agreement
- Track and review agreement status
- Approve the Case Agreement for compliance and payment

Task 1: Create Services Case Agreements for Subsidy

1. Navigate to the **Cases** tab from the **Home** dropdown.
2. Click the desired **Case ID**. The Case Record displays.
3. Click the **Case Agreements** hyperlink from the **Related List Quick Links** section.
4. Click **New** to create a new record. The **New Case Agreement** pop-up displays.

5. Select the **Services Case Agreement** radio button and click **Next**. The **New Case Agreement: Services Case Agreement** pop-up displays.
6. Click the **Agreement Type** dropdown and select *Relative Caregiver Program Subsidy*. The options in the dropdown are:
 - Bright Futures Case Management
 - Private Provider Case Management
 - Independent Living Allowance
 - In-Home Continuum
 - LifeSet
 - Relative Caregiver Program Subsidy
7. Click the **Service Taxonomy ID** field and enter the required subsidized services record name.
8. Click the **Case ID** field and enter the required Case Person name of the child/youth.
9. The default status in the **Agreement Status** dropdown is **Pending**. The options in the dropdown are:
 - Finalized
 - Pending
 - Withdrawn
10. Click the **Agreement Start Date** field and enter the start date of the agreement.
11. Click the **Agreement End Date** field and enter the end date of the agreement.
12. Click the **Payment Effective Date** field and enter the date from which payment is to be effective.
13. Click the **Projected Payment End Date** field and enter the date till which the payment is effective.
14. Scroll down to the **Provider Information** section.
15. Scroll down to the **Approval Information** section.
16. Click the **Approver** field and enter the Approver name.
17. Click the **Approval Action Status** dropdown and select the status of approval.
18. Scroll down to the **Navigation Links** section.
19. The **Case ID** field auto populates.
20. Click **Save**. The Record is saved.
21. Click **Submit for Approval**. The **Submit for Approval** pop-up displays.
22. Click **Submit**. The Record is submitted for approval.



System Tip!

- **Projected Payment End Date:** Payment End Date Cannot End After Agreement End Date
- **Payment Effective Date:** Payment Effective Date cannot be before the Agreement Start Date
- **Agreement Start Date:** Agreement Start Date cannot be after the Agreement End Date
- **Agreement End Date:** Agreement End Date cannot be before the Agreement Start Date

Task 2: Services Case Agreements Related List: Agreement Reviews

1. Click the **Agreement Reviews** hyperlink in the **Related List Quick Links** section on the **Case Agreement** screen.
2. Click **New** to create a new Record.
3. Click the **Date Case Agreement Reviewed** field and enter the date on which the case agreement was reviewed.
4. Click the **Revise Agreement** dropdown and select if a revision of the agreement is required.
5. Click the **Next Review Due Date** field and enter a date for the next review, if applicable.
6. Click the **First Request Mail Date** field and enter the first request mail date, if applicable.
7. Click the **Second Request Mail Date** field and enter the second request mail date, if applicable.
8. The default option in the **Agreement Review Status** dropdown is *Pending*. The options in the dropdown are:
 - Abridged
 - Completed
 - Pending
 - Worklisted
9. Click the **Date Agreement Sent to Parent/Guardian** field and enter the required date.
10. Click the **Date Appeal Rights and Notification Sent** field and enter the required date.
11. Click the **Date Agreement Received** field and enter the date on which the agreement was received.

12. Click the **Subsidy Review Type** dropdown and select the type of subsidy review. The options in the dropdown are:
 - Modification
 - Periodic Review
 - Review of Eligibility for Children 18 and over
 - Termination
13. Scroll the **Approval Details** section.
14. Select the **Approval Action Status** dropdown and select the status of the approval action. The options in the dropdown are:
 - Approved
 - N/A
 - No Further Action Required
 - Rejected
 - Sent Back for Edits
 - Sent to Final Approver
 - Submitted for Approval
15. Click the **Supervisor** field and enter the supervisor's name.
16. Click **Save**. The Record is saved.

Task 3: Review the Services Case Agreement

1. Login as the assigned Relative Caregiver Supervisor and from the **Homepage**, click the **Notifications** icon. A list of notifications displays.
2. Click the **Agreement Review Needed** notification. The task displays.
3. Click **Mark Complete** after reviewing the agreement. The status is updated to *Completed*.

Task 4: Approve the Services Case Agreement

1. Login as the assigned Relative Caregiver Supervisor and from the **Homepage**, click the **Notifications** icon. A list of notifications displays.
2. Click the **Case Agreement** requiring approval notification. The task displays.
3. Click **Approve**. The **Approve Case Agreement** pop-up displays.
4. Click the **Comments** field and enter the required comments.
5. Click **Approve**. The Services Case Agreement is approved.

Knowledge Check!

Question 1: Which Agreement Type should you select to create a Services Case Agreement for a subsidy?

- A. LifeSet
- B. In-Home Continuum
- C. Relative Caregiver Program Subsidy
- D. Independent Living Allowance

Glossary

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

Term	Definition
Case Person Detail	Screen name for viewing person information within a case context rather than the Person Detail screen.
Case Summary	Tab on the Investigation Record providing an AI-generated summary that includes a high-level overview of case status, assessments, placements, interactions, and court orders.
CCWIS	Comprehensive Child Welfare Information System.
C-FIRST!	Tennessee's CCWIS platform built on Salesforce. C-FIRST! stands for Child and Family Information Records System Tracking.
Homepage	The main landing page in C-FIRST! that displays widgets and other workload management tools.
Kanban View	Displays list views as cards arranged in columns, representing different stages of a workflow.
List View	Standard/default list views cannot be filtered directly; they must be cloned first to enable the filtering controls.

Term	Definition
Navigation Bar	The horizontal menu at the top of the C-FIRST! interface with quick access to Home, Cases, Persons, Court Orders, and Reports.
PID	Personal Identification number which is a unique identifier automatically assigned to each established person record in C-FIRST!.
Related List	A section on a C-FIRST! record page that displays associated information like Persons Involved, Court Orders, Placements, Case Documentation, and Staff Involved.
Worklisted	Task status indicating you have been assigned a task to complete.