



C-FIRST! Training

Delegated Purchasing Authority
(DPA) Providers Learner Guide

Tennessee Department of Children's Services



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Introduction to DPA Providers

Welcome to State of Tennessee Department of Children's Services (DCS) C-FIRST! **Delegated Purchase Authority (DPA) Providers Course.** We are excited to have you here with us! 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 DPA Providers including Provider Portal Request, navigating the Portal Main Menu and Key Sections, Service Referrals, and Invoicing.

Let's Dive In

This guide helps DPA Providers understand how to use the Provider Portal to complete key daily tasks that support children and families.

You will learn how to request access and navigate the portal, update service requests and service details, and submit invoices in the Provider Portal.

What to Expect

Throughout this guide, you will learn the Provider Portal to build confidence with the tasks DPA Providers complete most often. You will be tasked with:

1. Accessing the Provider Portal, requesting an account, and navigating key pages and menu options.
2. Using portal features such as My Applications, Home, Associated Items, My Tasks, and Support.
3. Accessing service requests, updating statuses, entering service rendered details, and reviewing the services log.
4. Creating and submitting invoices in the Provider Portal.

By the end of this course, you should feel prepared to navigate the Portal and complete key tasks accurately and efficiently.

Your Role

You are responsible for completing key activities in the Provider Portal that support service delivery and timely documentation. In this course, you will learn how to navigate the portal and update service requests. You will also learn how to submit information for invoicing. These tasks help ensure accurate records, support efficient follow-up, and keep important provider and placement information up to date.

Course Objectives

After completing this course, users will be able to:

- Navigate key sections of the Provider Portal
- Accept service referrals, document completion of services for invoicing

Module 1: Portal Navigation and System Overview

The Provider Portal is a centralized digital platform that supports the external providers by providing access to key resources, tools and services, and information needed to support children and families within the child welfare system. In this module, you will get an overview of the Provider Portal and its main features, including how a potential provider requests an account and how users navigate the system effectively. A potential provider requests an account with the Provider Portal.

After completing this module, you will be able to:

- Log in to the Provider Portal by requesting a Portal Account
- Navigate the Portal Homepage and access the different tabs

Lesson 1: Logging into the Portal

This lesson introduces you to the first steps for accessing the Provider Portal. You will review how to request a portal account, complete account setup, and become familiar with key landing areas such as the **My Applications** tab and the **Home** tab.

Learning Objectives

- Request a Portal Account
- Access My Applications and the Home tab

Task 1: Request a Portal Account

1. Open the Tennessee Department of Children's Services Provider Portal.
2. Click the **Register** button, on the main page of the portal. The registration screen displays.
3. Click **Requested Profile Type** drop-down, select **Organization**. The options in the drop-down are:
 - Individual
 - Organization

Note: The **Requested Profile Type** field determines how your profile will be set up for the Portal Account. If you are a person registering as

themselves, choose *Individual*. If you represent a business, agency or provider organization, select *Organization*.

4. Click **Phone** field, enter the *number*.
5. Click **Mailing Address** field, enter the *site address*.
6. Click **Email Address** field, enter the *email address*.
7. Click **Provider Organization Name** field, enter the *Organization name*.
8. Click **Register**. The **Verify that you are human** screen displays. **Note:** The Register button will be disabled until all the mandatory fields are completed.
9. Click the **checkbox** for "I am not a robot" verification.
10. Select the appropriate images for verification and click **Verify**.
11. The registration request will be submitted successfully, and you will be navigated to the confirmation page.

Task 2: Portal Account Setup

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

- What was your favorite place to visit as a child?
 - What is the name of your first school?
6. Click the **Answer** field, enter the *answer*.
 7. Click **Continue** and **Set up Your Account Password** screen displays.
 8. Click **Create Password** field, enter a new *password*.
 9. Click **Confirm Password** field, enter the *password* again.
 10. Click **Create Account**. The account has been created successfully.
 11. The **Welcome to Tennessee's Department of Children's Services Provider Portal** screen displays.
 12. Click the **Username** field, enter the registered *email address*.
 13. Click the **Password** field, enter the *password* and click **Login**.
 14. The **Welcome** screen displays, welcoming you to the portal.

Task 3: Access My Applications tab

1. Navigate to **My Applications** tab on the Homepage. The **My Applications** screen displays.
2. Click the desired **Application Number** hyperlink of a draft or submitted application to review the details.
3. The **My Applications** tab displays the following fields:
Application Number, Application Type, Provider Type, Submission Date, Application Status. **Note:** The **Application Number** is a unique system generated application ID.

Note: Existing providers will not need to submit a new application at go-live. If a provider would like to offer a new or different service or placement, they may use this feature for that purpose. To add new or different services, you must consult with the DCS Network Development team regarding service expansion, as outlined in the contract provider manual.

Task 4: Access the Home Tab

1. Log in using the **Provider Portal** credentials. The Homepage displays.
Note: Once you log in to the Provider Portal, the landing page will show your organization name.
2. The **Home** tab has the following sections:

- **Placements:** This widget displays the recently created placements. Click the **View All Placements** hyperlink, to view all the placements.
- **Upcoming Tasks:** This widget displays all the tasks that are due within the next five business days. Click the **View All Tasks** hyperlink to view all the tasks that are due.
- **Invoices:** This widget displays the recently created invoices. Click the **View All Invoices** hyperlink, to view all the invoices.
- **Requests:** This widget displays the recently created support requests. Click the **View All Requests** hyperlink, to view all the requests.

Lesson 2: Navigate the Main Menu Options and the Key Sections

This lesson focuses on using the portal's navigation features to find tools, tasks, and support resources. You will explore the main menu options and practice accessing important areas such as Associated Items, My Tasks, and Support.

Learning Objectives

- Navigate the Associated Items tabs
- Access My Tasks and Support tab

Task 1: Navigate the Associated Items tab

1. Click the **Associated Items** tab. The **Associated Items** tab displays.
2. Review the following fields in the **Placements** section: **Placement ID, Child, Placement Type, Services, Placement Status, Start, and End Date.**
3. Review the following fields in the **Placement Referrals** section: **Provider Contact ID, Requested Placement Type, Needed Start Date, Needed End Date, Status, Referral Response Due Date.**
4. Review the following fields in **Case Summaries** section: **File ID, File Name, Date Submitted, Status, Error File Name**
5. Click the **Licenses** tab. The **Licenses** tab displays. Review the following fields: **License Number, License Category, Date**

Effective, Expiration Date, License Type, Provider, State, Licensing Agency, and Status.

6. Click the **Invoices** tab. The **Invoices** tab displays the following fields: **Invoice ID, Invoice Status, Invoice Type, Invoice Date, Period Start Date, Period End Date, Provider Agreement, Invoice Amount, Payment Date.**

Task 2: Access My Tasks tab and Support tab

1. Click **My Tasks** tab. The **My Tasks** screen displays all the tasks that are assigned to the Provider.
2. Review the following fields in the **My Tasks** screen: **Task ID, Task Title, Task Description, Due Date/ Completion Date, Related Item, Task Status.**
3. Click **Support** tab on the Homepage. The **Support Requests** screen displays.
4. Click **New Request**. The **New Support Request** screen displays.
5. Click the **Request Type** drop-down, select the relevant request type. The options in the drop-down are:
 - Add New Person to Home/Organization
 - Address Change
 - Capacity (Congregate Care Facility)
 - Changes Impacting Eligibility Status
 - Clearance Request
 - Contact By Subsidy Specialist
 - Contact Information Change
 - Other
 - Placement Change
 - Placement Hold
 - Rate Decrease Due to Change in Child's Level of Care
 - Rate Increase Due to Age
 - Rate Increase Due to Increase in Child's Level of Care
 - Respite
 - Termination of Subsidy
 - Update Environment
 - Update Persons in Household
 - Update Pets
 - Update to Direct Deposit Information
 - Update Vehicle Information

- Verification of Subsidy Payment
6. Click the **Subject** field, enter the *subject*.
Note: The **Request Date** field is auto populated.
 7. Click **Select your file to upload**. The **Upload File** pop-up displays.
 8. Click the **Document Date** field, enter the *date*.
 9. Click the **Document Name** field, enter the *document name*.
 10. Click **Upload Files**, upload the appropriate document.
 11. Click the **Comments** field, enter the appropriate comments and click **Save**.
 12. Navigate to the **New Support Request** screen.
 13. Click the **Comments** field, enter the appropriate comments.
 14. Click **Submit**. The new change request is submitted successfully.

Knowledge Check!

Question 1: What are the sections that are displayed on the Home tab?

- A. Placements, Upcoming Tasks, Invoices, Requests
- B. Associated Items, Service Referrals, Placements, Upcoming Tasks
- C. Licenses, Service, Invoices, Incident Reporting
- D. Placements, My Tasks, Agreements, Provider Person

Question 2: Which field on the New Support Request screen is auto populated?

- A. Subject
- B. Document Name
- C. Request Date
- D. Comments

Module 2: Service Management and Decision Processing

This module explains how DCS staff create and manage service requests in C-FIRST! and how external providers respond through the Provider Portal.

In C-FIRST!, the DCS staff member creates a service request by entering the required details and selecting the appropriate service type. The request then moves through supervisory approval before it is released to providers.

Once the referral is approved, the system sends the referral to eligible providers through the Provider Portal. Depending on the referral type, it may be sent to a single provider or issued as a blast to multiple providers. In most cases, the referral is sent to eligible providers in the service county that offer the service. Providers must respond to the referral within 2 business days to indicate whether they are willing to provide the service. The supervisor reviews provider responses and selects the provider who will deliver the service.

Note: Accepting a referral does **not** authorize the provider to begin services. Services may begin only after DCS selects the provider and the provider receives confirmation through the Provider Portal. This confirmation replaces the prior service authorization approach.

After services have been delivered, the provider records the services provided in the Portal. This step is referred to as Service Rendered in the Provider Portal and as a Service Log in C-FIRST!. These terms refer to the same service activity across two systems. Once submitted, the service record is reviewed and approved by DCS in C-FIRST!. If approved, the records support invoice generation and fiscal processing. If denied, the provider must review the status in the portal, provide a reason for the denial and complete any required follow-up before payment can occur.

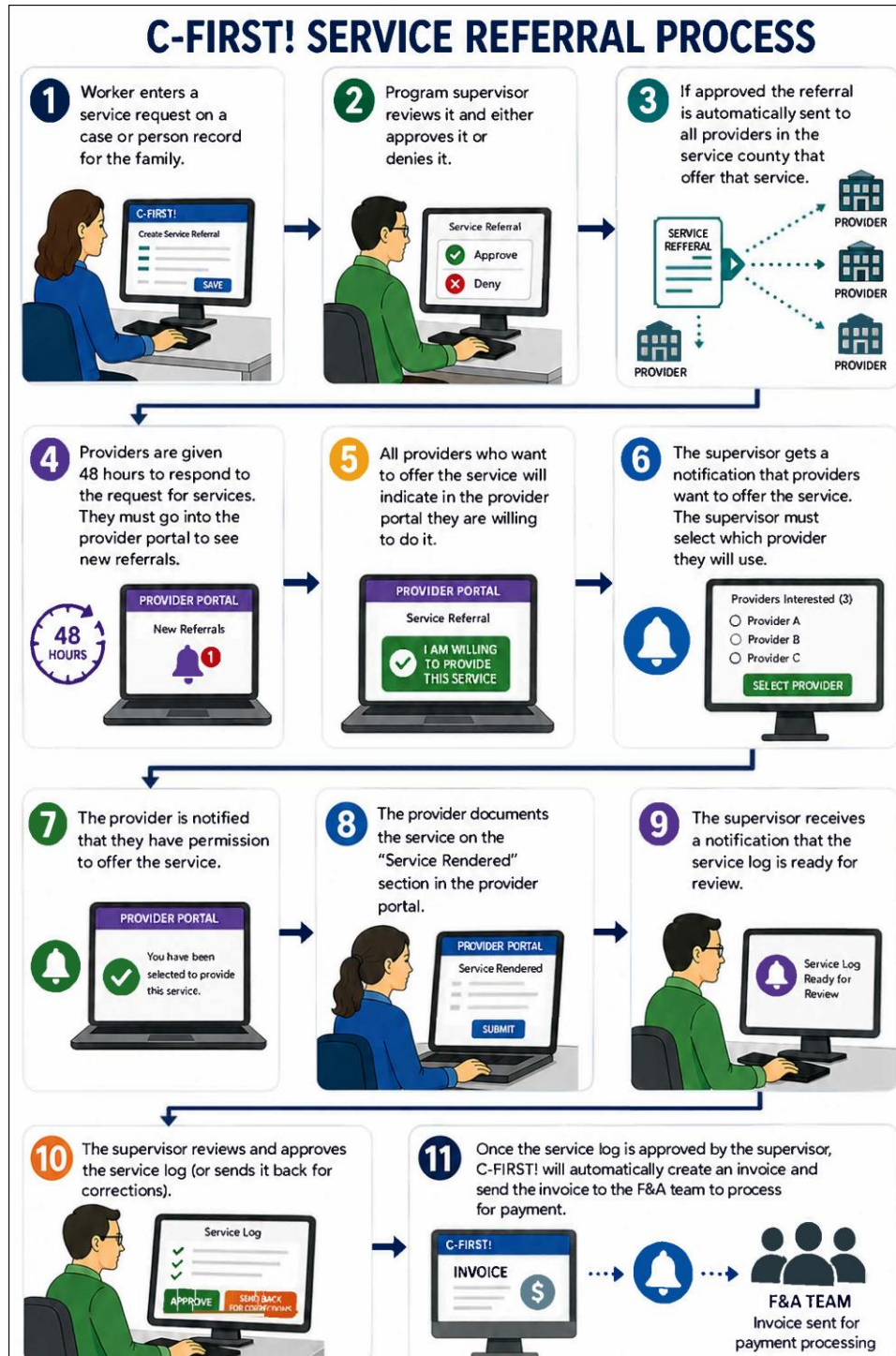
Note: Providers must fully complete and submit Services Rendered in the Provider Portal for payment to be processed. Submitted Services Rendered automatically generates the invoice, and once this process goes live, DCS will no longer accept provider-submitted invoices.

This process helps ensure that service referral entry, provider response, service delivery, service logging and fiscal processing occur in the correct sequence across both C-FIRST! and the Provider Portal.

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

- Review Service Referral and add Service Rendered information
- Review Service Logs

Refer to the image below for additional information on the process.



Service Referral Process

Lesson 1: Managing Service Request

In this lesson, you will learn how DCS staff manage Service Requests in C-FIRST! and how external providers document Service Logs in the Provider Portal. You will build familiarity with updating an existing Service Request, entering required details, and understanding how Service Requests connect to Service Logs. By the end of the lesson, you will understand how these activities support accurate service documentation, coordination between DCS staff and providers, and timely processing.

Learning Objectives

- Access and update a Service Request
- Update service rendered details
- Access related Service Logs in Provider Portal

Task 1: Access a Service Referral and Update Status

Providers must monitor the provider portal for new referrals. When a referral is available, the provider has 2 business days to accept or reject it. Providers must not begin services simply because they accepted the referral. Services can only begin after DCS confirms that the provider has been selected for the referral. If providers do not regularly check the portal, they may miss referral opportunities.

1. Log in to the **Provider Portal** with your username and password. The Homepage displays.
2. Click the **Associated Items** tab and then the **Services** tab. The **Services** list view displays.
3. Click on a **Service Referral ID** hyperlink to open the details of the **Service Referral** with a **Referral Status** that *Requires Provider Review*. The **Service Referral Details** screen is displayed.
4. Review the details of the **Service Referral Information** and click the **Respond** button.
5. Click either on **Accept** to accept the service or **Decline** to decline to provide the service. **Note:** If the user clicks on **Decline**, a **Service Declined** pop-up will be displayed. Enter the comment on **Reason for Declining Service** field and click **Submit**.

6. Select the **Remittance Address** field and enter the address associated with the service referral. **Note:** When the user selects the **Accept**, a **Provider Decision** pop-up is displayed and the user will be presented with the **Terms and Conditions**. The user must acknowledge and accept these terms before submitting the acceptance of the referral.

Note: Accepting a **Service Referral** means the provider is available and willing to provide the service. It does not mean the provider should begin services yet. At this stage, the referral may have been sent to multiple providers, and services may begin only after DCS selects the provider and notifies them through the Provider Portal.

7. Click the **Submit** button to proceed.

Task 2: Add Service Rendered Details

When a service referral is accepted by a Provider, the Service Rendered Status field will be updated to Accepted and a Add Service Rendered button will be visible to the user.

1. Click the **Add Service Rendered**, to add details of the new service rendered.
2. Click the **Service Date** field and enter the *date*. **Note:** The **Service Rendered Status** is selected to *Draft* by default.
3. Click the **Hours/Units** field and enter the information.
4. Click the **Service Location** field and select the location where the services will be provided.
5. Click **Notes** field, enter any notes associated with the service rendered.
6. Click **Submit** to proceed. The **Service Rendered Details** screen displays.

Note: Service Logs cannot be created from the Provider record or a case. They are automatically created when providers submit **Services Rendered** through the **Provider Portal**. Providers must submit a separate **Services Rendered** record for each date services are provided.

Note: Service extensions are initiated by DCS workers in C-FIRST! and require Supervisor approval before being sent to the Provider Portal

for review. When an extension is approved, the Provider will receive a notification and the referral status will update to *Extension – Requires Provider Review*. The Provider must **Accept or Decline** the extension via the Portal before extended services can begin.

Task 3: Reviewing an Invoice for Payment

The invoice section is where payments will be reviewed and accepted.

1. Log in to the **Provider Portal** with your username and password. The Homepage displays.
2. Click the **Associated Items** tab and then the **Invoices** tab. The **Invoices** list view displays.
3. Click on the **Invoice ID** hyperlink to open the details of the **Invoice**.

Knowledge Check!

Question 1: After a referral becomes available in the Provider Portal, within how many business days must the provider accept or reject it?

- A. 5 business days
- B. 3 business days
- C. 4 business days
- D. 2 business days

Question 2: When are Service Logs created in the Provider Portal process?

- A. Providers directly create them from the Provider record
- B. They are created automatically when Providers submit the Services Rendered
- C. Providers directly create them from the case
- D. They are created by the Licensing Consultants manually

Question 3: When a Provider accepts a referral, what must be completed before submitting the acceptance?

- A. A service log must be created manually
- B. The Provider must enter notes in the Service Location field
- C. The Provider must acknowledge and accept the Terms and Conditions
- D. The Licensing consultant must approve the referral in C-FIRST!

Glossary

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

Term	Definition
CCWIS	This refers to Comprehensive Child Welfare Information System.
C-FIRST!	C-FIRST! is the name of our new modernized child welfare system; this system is on a Salesforce platform. C-FIRST! stands for Child and Family Information, Records System Tracking.
DCS	This refers to the Department of Children's Services (Tennessee).
Field	A part of an object that holds a specific piece of information, such as text or a number.
List View	A list display of items (for example accounts or contacts) based on a specific criterion.
Navigation Links	This is a section on all related lists and other main screens (Provider, Case, Intake). The links allow you to navigate to associated records such as the parent record.
NPI	This refers to National Provider Identification, which is unique 10-digit identification number assigned to Provider Organizations.
PREA	This refers to Prison Rape Elimination Act (Risk Assessment).
QRTP	This refers to Qualified Residential Treatment Program.
RET	This refers to the Resource Eligibility Team.
Related List	A section of a record or other detail page that lists items related to that record.
Related List Quick Links	This is a section on top of any record that displays a list of links that leads to List Views of records related to the original record.

Term	Definition
Widget	A small part of an app, like a button, search box that you can see or get information.