

Military OneSource CMS and MFLC Locator

- I. **General:** For both Military OneSource CMS and MFLC Locator
- a. **Login:** Using the Login page, users can log into the CMS and MFLC Locator sites. Users will be prompted to either enter in a username and password or use a CAC. Users must establish a username/password on the site before a CAC can be associated to an account.

Login

Login to your account

* Username

* Password

[Forgot your password?](#)

Common Access Card (CAC) Login

Log in with your Common Access Card (CAC)

*** Security Warning ***

YOU ARE ACCESSING A U.S. GOVERNMENT (USG) INFORMATION SYSTEM (IS) THAT IS PROVIDED FOR USG-AUTHORIZED USE ONLY. By using this IS (which includes any device attached to this IS), you consent to the following conditions:

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Figure 1.1

- b. **Forgot Your Password?:** Users can retrieve usernames and reset passwords by using the “Forgot Your Password?” link on the login page. Users must enter in the email address that is associated with his/her account.

[Login](#) | [Forgotten Your Password?](#)

Forgotten Your Password?

Use this form to have password recovery instructions emailed to the account address you registered with. Please enter the email address associated with your account here.

Forgotten My Password

* Email

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Figure 1.2

- c. **Forgotten Password Confirmation Page:** Users will receive a confirmation message letting him/her know that the request has been sent. Users will be prompted to go to the homepage or to the login page.

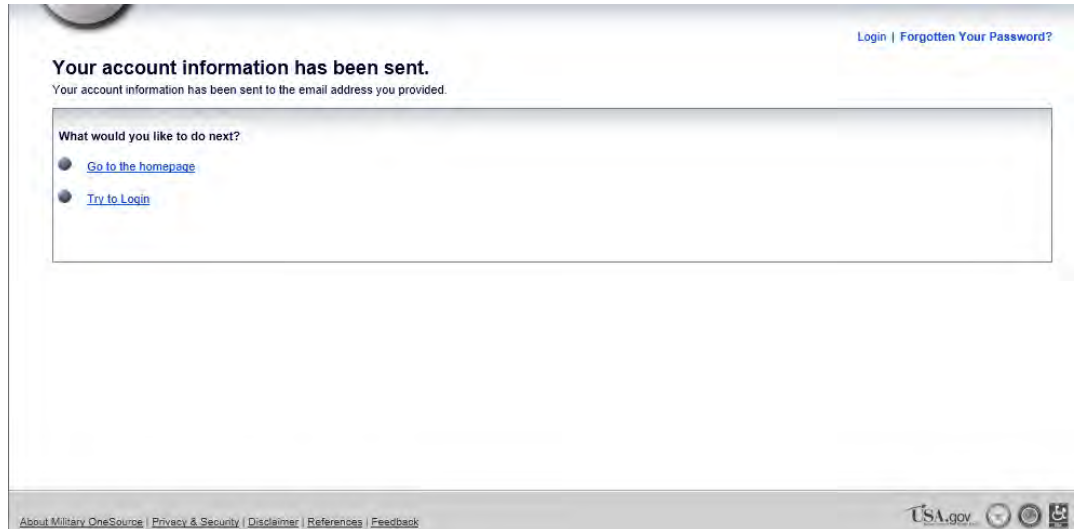


Figure 1.3

- d. **Profile:** Users can click on the "Profile" from any page in the system to access his/her account profile. Users can view/update his/her information, email preferences, and change his/her password.

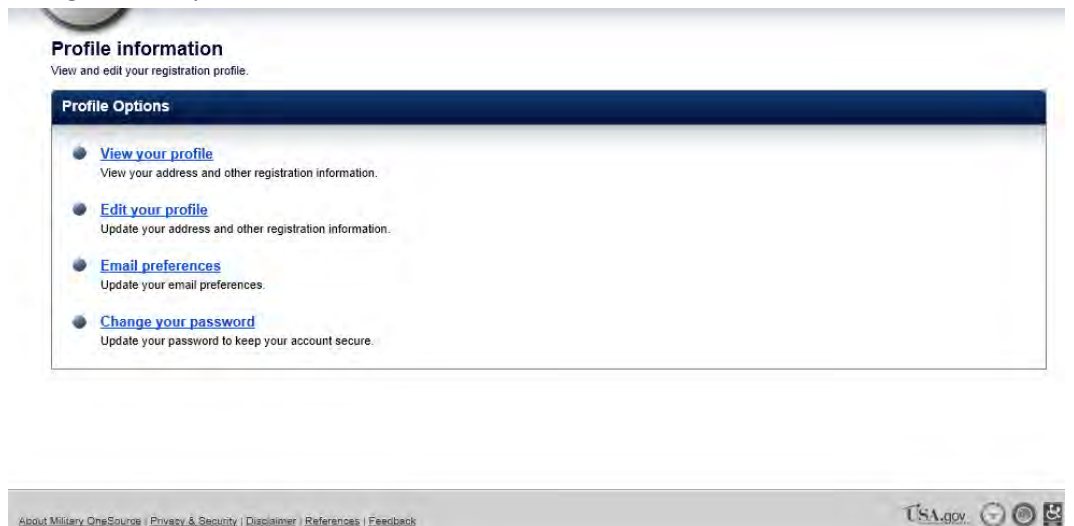


Figure 1.4

- e. **View Profile:** Users can view account information including name, username, email address, and login information (Figure 1.5).

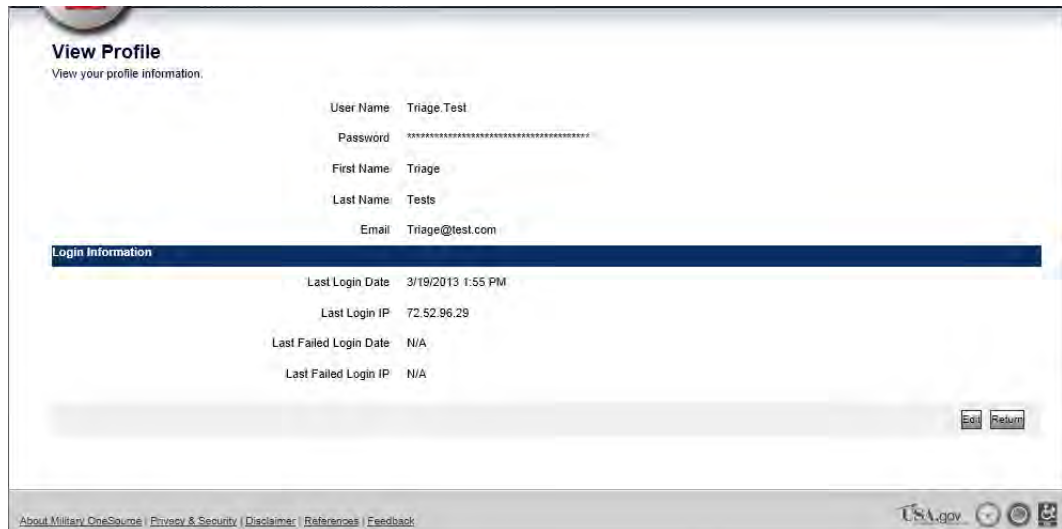


Figure 1.5

- f. **Edit Profile:** Users can edit account information including name and email address (Figure 1.6).

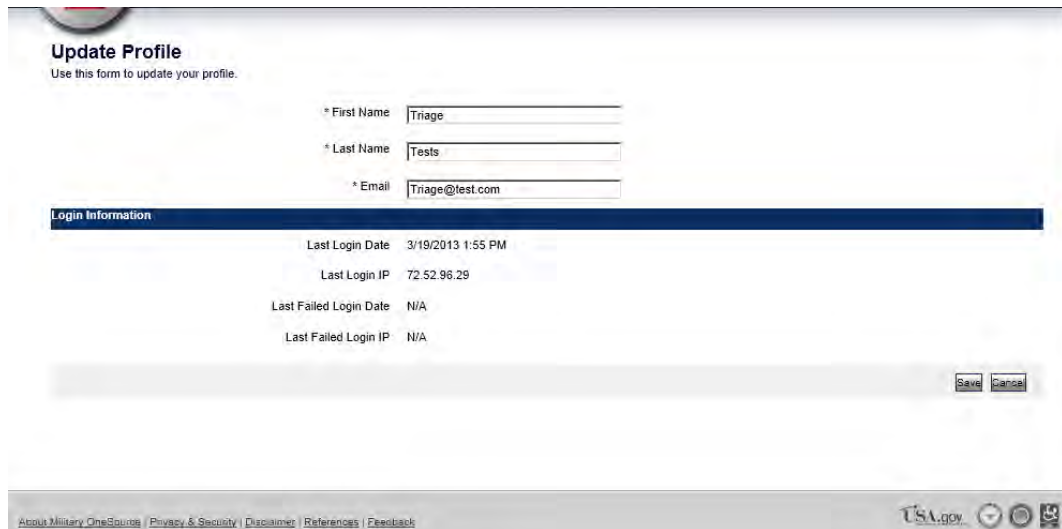


Figure 1.6

- g. **Email Preferences:** Users can opt out of bulk email (if any bulk email will be sent from the site- such as newsletters).

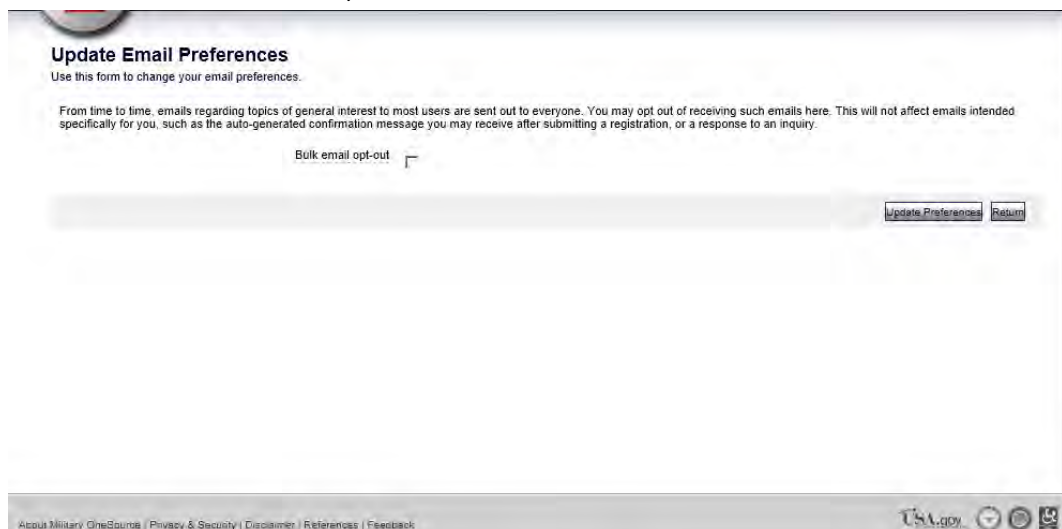


Figure 1.7

- h. **Change Password:** Users can change his/her password by clicking on the “Change Password” link. Users will be prompted to enter in the old password once and the new password twice for confirmation purposes.

Update Password
Use this form to update your password.

Current Password
* Current Password

New Password
* New Password

* Confirm New Password

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Figure 1.8

II. CMS

a. Search

- i. **Search Page (without results):** Users can use the search page to locate participant records.

Military OneSource
CASE MANAGEMENT SYSTEM

SEARCH PROFILE LOGOUT

Search

First Name Middle Name Last Name Participant ID

Phone DOB Case Number

Primary Email

Name	Address	City	State	Postal Code	Phone	DOB
------	---------	------	-------	-------------	-------	-----

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Figure 2.1

- ii. **Search Page (with results):** Users can click on a search result to open a participant record (Figure 2.2).

The screenshot shows the Military OneSource Search page. At the top, there are navigation links for SEARCH, PROFILE, and LOGOUT. The page title is "Military OneSource CARE MANAGEMENT SYSTEM". On the left, there is a "DASHBOARD" section with "UNATTACHED CRISIS CALLS" and a list of names including [Unknown], Alan Johnson, John Adams, [Unknown], Jerry Camp, Jacob Matthew, Josh Jacobs, Dante Peake, George Homer, Sally, Brad Nelson, Michael N Bolliger, and Frank Major. The main search area has fields for First Name, Middle Name, Last Name, Participant ID, Phone, DOB, and Primary Email. A "Search" button and a "Clear" button are present. Below the search area, it says "Participant search found 12 participants" and displays a table with columns: Name, Address, City, State, Postal Code, Phone, and DOB. The table lists participants such as Jong, Brian; Jenson, Steven; Jones, Mary; Jones, Jan B; Jacobs, Josh; Jones, Jane; and Jones, Jamie J. An "Add New" button is at the bottom right of the table. The footer includes "About Military OneSource | Privacy & Security | Disclaimer | References | Feedback" and the USA.gov logo.

Figure 2.2

b. **Participant Record**

- i. **Add New Participant:** Triage Consultants can use the “Add New” button on the Search page in order to add new participants to the system.

The screenshot shows the "Create New Participant" form in the Military OneSource system. At the top, there are navigation links for SEARCH, PROFILE, and LOGOUT. The page title is "Military OneSource CARE MANAGEMENT SYSTEM". On the left, there is a "DASHBOARD" section with "PARTICIPANT OVERVIEW" and fields for Name, Participant ID, Current Address, Phone, and DOB. The main form area is titled "Create New Participant" and includes a note: "* Indicates a required field". The form has several sections:

- Name:** First*, Middle, Last*, and Suffix fields.
- DOB*:** Date of Birth field.
- *Gender:** Dropdown menu.
- *Marital Status:** Dropdown menu.
- Current Address:** Fields for City, State, Postal Code, and Country.
- Mailing Address:** Fields for City, State, Postal Code, and Country.
- Preferred Phone:** Field with a "Confidential" checkbox.
- Work Phone:** Field.
- Cell Phone:** Field with a "Confidential" checkbox.
- Email Address:** Field with a "Confidential" checkbox.
- *Requires Interpreter:** Dropdown menu.
- Referred By:** Dropdown menu with "Other Source" as an option.
- Eligibility Information:**
 - Service Member?:** Radio buttons for Yes and No.
 - *Relation:** Dropdown menu.
 - *Branch of SVC:** Dropdown menu.
 - *Pay Grade:** Dropdown menu.
 - *Eligibility Status:** Dropdown menu.
 - Recovering Warrior:** Checkbox.
 - Retiring Within 180 Days:** Checkbox.
 - Discharged Within 180 Days:** Checkbox.
 - Closest Installation:** Dropdown menu with "Enter an installation..." as an option.

 At the bottom right, there are "Cancel", "Save", and "Done" buttons. The footer includes "About Military OneSource | Privacy & Security | Disclaimer | References | Feedback" and the USA.gov logo.

Figure 2.3

- ii. **View Participant:** Users can view a participant’s record by selecting an entry from the Search results.

Military OneSource
CASE MANAGEMENT SYSTEM

SEARCH PROFILE LOGOUT

View Participant [Create Case] [Edit]

DASHBOARD

PARTICIPANT OVERVIEW

Name
[Mary Jones](#)

Participant ID
8

Current Address
123 First Street
Los Angeles, CA 91001
United States

Phone
+034-343-433-4343

DOB
2/1/2013

RELATED CASES

[Recovering Warrior](#)
[Tax Services](#)
[SECO Specialty Consult](#)
[SECO Specialty Consult](#)
[SECO Specialty Consult](#)
[More](#)

Participant Name and Information

First	Middle	Last	Suffix
Mary		Jones	

DOB 2/1/2013 **Gender** Female **Marital Status** Single

Current Address

Address: 123 First Street

City	State	Postal Code
Los Angeles	CA	91001

Country: United States

Mailing Address

Address: 456 Second Street

City	State	Postal Code
San Diego	CA	92002

Country: United States

Telephone

Preferred Phone	Work Phone	Cell Phone
+034-343-433-4343		

Confidential

Email

Email Address: mary@jones.com
Confidential

Eligibility Info

Service Member? No

Relation: Family Member Spouse

Pay Grade: E-4

Branch of SVC: Air National Guard

Eligibility Status: Active Duty

Retiring Within 180 Days

Discharged Within 180 Days

Closest Installation: Fort Wainwright

Additional Information

Requires Interpreter: No Referred By:


[Done]

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Figure 2.4

- iii. **Edit Participant:** Users can edit a participant’s record by clicking on the “Edit” button on the “View Participant” page (Figure 2.5).

SEARCH PROFILE LOGOUT



Military OneSource

CARE MANAGEMENT SYSTEM

DASHBOARD

PARTICIPANT OVERVIEW

Name
[Mary Jones](#)

Participant ID
8

Current Address
123 First Street
Los Angeles, CA 91001
United States

Phone
+034-343-433-4343

DOB
2/1/2013

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Edit Participant

* Indicates a required field

First*	Middle	Last*	Suffix
<input type="text" value="Mary"/>	<input type="text"/>	<input type="text" value="Jones"/>	<input type="text"/>
DOB*	*Gender	*Marital Status	
<input type="text" value="2/1/2013"/>	<input type="text" value="Female"/>	<input type="text" value="Single"/>	
Current Address			
<input type="text" value="123 First Street"/>			
City	State	Postal Code	Country
<input type="text" value="Los Angeles"/>	<input type="text" value="CA"/>	<input type="text" value="91001"/>	<input type="text" value="United States"/>
Mailing Address			
<input type="text" value="456 Second Street"/>			
City	State	Postal Code	Country
<input type="text" value="San Diego"/>	<input type="text" value="CA"/>	<input type="text" value="92002"/>	<input type="text" value="United States"/>
Preferred Phone	<input checked="" type="checkbox"/> Confidential		
<input type="text" value="+034-343-433-4343"/>			
Work Phone	<input type="text"/>		
Cell Phone	<input type="checkbox"/> Confidential		
<input type="text"/>			
Email Address	<input checked="" type="checkbox"/> Confidential	<input type="checkbox"/> Requires Interpreter	Referred By
<input type="text" value="mary@jones.com"/>	<input type="text" value="Please Select"/>	<input type="text" value="Please Select"/>	<input type="text" value="Please Select"/>
			Other Source <input type="text"/>

Eligibility Information

Service Member?
 Yes
 No

*Relation

*Branch of SVC

*Pay Grade

*Eligibility Status

Recovering Warrior
 Retiring Within 180 Days
 Discharged Within 180 Days

Closest Installation

[Cancel](#)

CRISIS/OTW/ANW

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Figure 2.5

- c. **Program Referrals:** Users can create program referrals by clicking on the “Create Case” button from a participant’s record. All program referral options display (Figure 3.1).

Military OneSource
CARE MANAGEMENT SYSTEM

SEARCH PROFILE LOGOUT

Financial Non-Medical SECO Info & Referrals Tax Specialty Health & Wellness Recovering Warrior Document Translation

DASHBOARD

View Participant Cancel Edit

PARTICIPANT OVERVIEW

Name
[Mary Jones](#)

Participant ID
8

Current Address
123 First Street
Los Angeles, CA 91001
United States

Phone
+034-343-433-4343

DOB
2/1/2013

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Participant Name and Information

First	Middle	Last	Suffix
Mary		Jones	

DOB 2/1/2013 **Gender** Female **Marital Status** Single

Current Address

Address
123 First Street

City	State	Postal Code
Los Angeles	CA	91001

Country
United States

Mailing Address

Address
456 Second Street

City	State	Postal Code
San Diego	CA	92002

Country
United States

Telephone

Preferred Phone	Work Phone	Cell Phone
+034-343-433-4343 Confidential		

Email

Email Address
mary@jones.com
Confidential

Additional Information

Requires Interpreter	Referred By
No	

Eligibility Info

Service Member?
No

Relation
Family Member Spouse

Pay Grade
E-4

Branch of SVC
Air National Guard

Eligibility Status
Active Duty

Retiring Within 180 Days

Discharged Within 180 Days

Closest Installation
Fort Wainwright

Done

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Figure 3.1

- i. **Financial:** Users can click on the Financial link to create a Financial Counseling program referral (Figure 3.2).

SEARCH PROFILE LOGOUT



Military OneSource

CASE MANAGEMENT SYSTEM

DASHBOARD

PARTICIPANT OVERVIEW

Name
Mary Jones

Participant ID
8

Current Address
123 First Street
Los Angeles, CA 91001
United States

Phone
+034-343-433-4343

DOB
2/1/2013

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Financial Counseling

Referral Options (check all that apply)

<input type="checkbox"/> Auto Loan	<input type="checkbox"/> Estate Planning	<input type="checkbox"/> Identity Theft Recovery	<input type="checkbox"/> Savings
<input type="checkbox"/> Budgeting	<input type="checkbox"/> Financial Assistance	<input type="checkbox"/> Insurance	<input type="checkbox"/> Tax
<input type="checkbox"/> Consolidation	<input type="checkbox"/> Financial Hardship	<input type="checkbox"/> Investments	<input type="checkbox"/> TSP
<input type="checkbox"/> Consumer Rights	<input type="checkbox"/> Foreclosure	<input type="checkbox"/> Planning for Deployment	<input type="checkbox"/> Other
<input type="checkbox"/> Credit Cards	<input type="checkbox"/> Home Loan	<input type="checkbox"/> Purchasing a Home	
<input type="checkbox"/> Debt / Financial	<input type="checkbox"/> Identity Theft Information	<input type="checkbox"/> Refinance Loan	
<input type="checkbox"/> Education	<input type="checkbox"/> Identity Theft Prevention	<input type="checkbox"/> Retirement	

***Counseling Delivery**
Please Select Participant prefers not to be contacted for follow-up

*Company *Counselor Name

Address

City State Postal Code Country

*Phone *Email

*Handoff Type Assigned to Interpreter Requested
Please Select Please Select Language Please Select

Handoff Notes

Urgent

[Cancel](#)


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Figure 3.2

- ii. **Non-Medical Counseling:** Users can click on the Non-Medical Counseling link to create a Non-medical Counseling program referral (Figure 3.3).

SEARCH PROFILE LOGOUT



Military OneSource

CARE MANAGEMENT SYSTEM

DASHBOARD

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DOB
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Non-Medical Counseling

Family member of those diagnosed with a mental disorder may be eligible for non-medical counseling. These are to be used for NON-CRISIS situations. If this is a CRISIS situation, then please use the Crisis Call Drawer to the right of the screen.

Limits of Confidentiality Explained

Information you provide to me or other counselors will be kept confidential, except to meet legal obligations or to prevent harm to self or others. Legal obligations include requirements of law and DoD or military regulations. Harm to self or others include suicidal thoughts or intent, a desire to harm oneself, domestic violence, child abuse or neglect, violence against any person, and any present or future illegal activity.

Presenting Problem

Language

Interpreter Requested

Referral Assessment

Select all that apply:

<input type="checkbox"/> Participant's Risk to Self	<input type="checkbox"/> Recurring Psychiatric Hospitalizations	<input type="checkbox"/> Substance Abuse
<input type="checkbox"/> Participant's Risk to Other	<input type="checkbox"/> Fitness for Duty or Court Ordered Evaluation	<input type="checkbox"/> Illegal Activity
<input type="checkbox"/> Currently Receiving Mental Health Treatment	<input type="checkbox"/> Domestic Abuse	
<input type="checkbox"/> Currently Prescribed Psychoactive Medication	<input type="checkbox"/> Child Abuse	
<input type="checkbox"/> Diagnosed with Mental Condition	<input type="checkbox"/> Sexual Assault/Rape	

Scope Determination

Cleared by FAP

[Cancel](#)


CRISIS/OTW/MR

PROGRAM REFERRALS

RELATED CASES

Figure 3.3

- 1. Non-Medical Counseling:** with “In Scope” and “MFLC” selected (Figure 3.4).



Military OneSource
CASE MANAGEMENT SYSTEM

[SEARCH](#) [PROFILE](#) [LOGOUT](#)

DASHBOARD

PARTICIPANT OVERVIEW

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Presenting Problem

Language

 Interpreter Requested

Referral Assessment

Select all that apply:

<input type="checkbox"/> Participant's Risk to Self	<input type="checkbox"/> Recurring Psychiatric Hospitalizations	<input type="checkbox"/> Substance Abuse
<input type="checkbox"/> Participant's Risk to Other	<input type="checkbox"/> Fitness for Duty or Court Ordered Evaluation	<input type="checkbox"/> Illegal Activity
<input type="checkbox"/> Currently Receiving Mental Health Treatment	<input type="checkbox"/> Domestic Abuse	
<input type="checkbox"/> Currently Prescribed Psychoactive Medication	<input type="checkbox"/> Child Abuse	
<input type="checkbox"/> Diagnosed with Mental Condition	<input type="checkbox"/> Sexual Assault/Rape	

Scope Determination

 Cleared by FAP

*Counseling Preference Participant is within 40 miles of MFLC installation [Open MFLC Locator](#)

*Type of Counseling Requested Participant accepts MFLC services

<input type="radio"/> Individual	*Referral Type
<input type="radio"/> Couple	<input type="text" value="MFLC"/>
<input type="radio"/> Family	

MFLC Info

*MFLC Category

*POC Phone <input type="text"/>	POC Installation Name <input type="text"/>	+
2nd POC Phone <input type="text"/>	2nd POC Installation Name <input type="text"/>	+

Handoff Type

Handoff Notes Urgent

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Figure 3.4

2. Non-Medical Counseling: With “In-Scope” and “MOS Network” selected (Figure 3.5).



Military OneSource
CARE MANAGEMENT SYSTEM

SEARCH PROFILE LOGOUT

Non-Medical Counseling

Family member of those diagnosed with a mental disorder may be eligible for non-medical counseling. These are to be used for NON-CRISIS situations. If this is a CRISIS situation, then please use the Crisis Call Drawer to the right of the screen.

Limits of Confidentiality Explained

Information you provide to me or other counselors will be kept confidential, except to meet legal obligations or to prevent harm to self or others. Legal obligations include requirements of law and DoD or military regulations. Harm to self or others include suicidal thoughts or intent, a desire to harm oneself, domestic violence, child abuse or neglect, violence against any person, and any present or future illegal activity.

Presenting Problem

Language
 Interpreter Requested

Referral Assessment

Select all that apply:

<input type="checkbox"/> Participant's Risk to Self	<input type="checkbox"/> Recurring Psychiatric Hospitalizations	<input type="checkbox"/> Substance Abuse
<input type="checkbox"/> Participant's Risk to Other	<input type="checkbox"/> Fitness for Duty or Court Ordered Evaluation	<input type="checkbox"/> Illegal Activity
<input type="checkbox"/> Currently Receiving Mental Health Treatment	<input type="checkbox"/> Domestic Abuse	
<input type="checkbox"/> Currently Prescribed Psychoactive Medication	<input type="checkbox"/> Child Abuse	
<input type="checkbox"/> Diagnosed with Mental Condition	<input type="checkbox"/> Sexual Assault/Rape	

Scope Determination
 Cleared by FAP

*Counseling Preference Participant is within 40 miles of MFLC installation [Open MFLC Locator](#)

*Type of Counseling Requested Participant accepts MFLC services

Individual Couple Family

*Referral Type

MOS Network

*Reason Requesting Counseling *Authorization Number

*Provider Name Phone *Location

Participant prefers not to be contacted for follow-up

Follow Up Date Follow Up Reason

Handoff Type

Handoff Notes Urgent

CRISIS/OTW/WR

PROGRAM REFERRALS

RELATED CASES

DASHBOARD

PARTICIPANT OVERVIEW

Name
[Mary Jones](#)

Participant ID
8

Current Address
123 First Street
Los Angeles, CA 91001
United States

Phone
+034-343-433-4343

DOB
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Figure 3.5

3. Non-Medical Counseling: with “Outside Scope” selected (Figure 3.6).

SEARCH PROFILE LOGOUT
Military OneSource

DASHBOARD

PARTICIPANT OVERVIEW

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Non-Medical Counseling

Family member of those diagnosed with a mental disorder may be eligible for non-medical counseling. These are to be used for NON-CRISIS situations. If this is a CRISIS situation, then please use the Crisis Call Drawer to the right of the screen.

Limits of Confidentiality Explained

Information you provide to me or other counselors will be kept confidential, except to meet legal obligations or to prevent harm to self or others. Legal obligations include requirements of law and DoD or military regulations. Harm to self or others include suicidal thoughts or intent, a desire to harm oneself, domestic violence, child abuse or neglect, violence against any person, and any present or future illegal activity.

Presenting Problem

Please Select

Language

 Interpreter Requested

Please Select

Referral Assessment

Select all that apply:

<input type="checkbox"/> Participant's Risk to Self	<input type="checkbox"/> Recurring Psychiatric Hospitalizations	<input type="checkbox"/> Substance Abuse
<input type="checkbox"/> Participant's Risk to Other	<input type="checkbox"/> Fitness for Duty or Court Ordered Evaluation	<input type="checkbox"/> Illegal Activity
<input type="checkbox"/> Currently Receiving Mental Health Treatment	<input type="checkbox"/> Domestic Abuse	
<input type="checkbox"/> Currently Prescribed Psychoactive Medication	<input type="checkbox"/> Child Abuse	
<input type="checkbox"/> Diagnosed with Mental Condition	<input type="checkbox"/> Sexual Assault/Rape	

Scope Determination

Outside Scope for Non-Medical Counseling Cleared by FAP

Referrals

Select all that apply:

- Adult Hospital
- Child Hospital
- Crisis
- Private Insurance
- RAINN (Rape Abuse & Incest Hotline)
- Sexual Assault Prevention Coordinator
- Sexual Assault Prevention Office
- State Legal Referral Service
- Substance Abuse Rehabilitation Program (SARP)
- Tincare
- Veterans Administration
- Victim Advocate

Handoff Type

Please Select

Participant has insurance
 Participant declined referral
 Participant terminated call

Handoff Notes Urgent

Cancel
Save
Done

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Figure 3.6

- iii. **SECO:** Users can click on the SECO link to create a SECO program referral (Figure 3.7).

The screenshot shows the Military OneSource Case Management System interface. The top navigation bar includes 'SEARCH', 'PROFILE', and 'LOGOUT'. The main header features the 'Military OneSource' logo and 'CASE MANAGEMENT SYSTEM'. The left sidebar contains a 'DASHBOARD' and 'PARTICIPANT OVERVIEW' section with details for 'Mary Jones', including her name, ID (8), current address (123 First Street, Los Angeles, CA 91001, United States), phone (+034-343-433-4343), and DOB (2/1/2013). Below this is a 'RELATED CASES' section with links for 'Recovering Warrior', 'Tax Services', and 'SECO Specialty Consult'. The main content area is titled 'SECO Triage' and contains a form with the following fields: '*Handoff Type' (Please Select), 'Assigned to' (Please Select), 'Interpreter Requested' (checkbox), and 'Language' (Please Select). There is also a 'Handoff Notes' text area and an 'Urgent' checkbox. At the bottom of the form are 'Cancel', 'Save', and 'Done' buttons. A vertical sidebar on the right contains links for 'CRISIS/DIV/WR', 'PROGRAM REFERRALS', and 'RELATED CASES'. The footer includes 'USA.gov' and various icons.

Figure 3.7

- iv. **Information and Referral:** Users can click on the Information and Referral link to create a I&R program referral (Figure 3.8).

Information & Referral

Select all that apply:

<input type="checkbox"/> Casualty Assistance Officer Phone Number	<input type="checkbox"/> Spouse Abandonment – Child Support	<input type="checkbox"/> Tax: Earned Income Tax Credit	<input type="checkbox"/> Tax: Other State Tax Issues
<input type="checkbox"/> Child Care	<input type="checkbox"/> Official Travel Information	<input type="checkbox"/> Tax: Education Student Loan Interest	<input type="checkbox"/> Tax: Personal Exceptions
<input type="checkbox"/> Child Care Aware	<input type="checkbox"/> Unofficial Travel Information	<input type="checkbox"/> Tax: Filing Extensions and Deadlines	<input type="checkbox"/> Tax: Power of Attorney
<input type="checkbox"/> Exceptional Family Member Program	<input type="checkbox"/> Veteran Crisis Line	<input type="checkbox"/> Tax: Filing Status Issues	<input type="checkbox"/> Tax: Retirement Savings Contribution Credit
<input type="checkbox"/> Financial Grant Information	<input type="checkbox"/> YMCA Enrollment	<input type="checkbox"/> Tax: Interest and Dividends	<input type="checkbox"/> Tax: Small Business
<input type="checkbox"/> Disaster Recovery	<input type="checkbox"/> Other	<input type="checkbox"/> Tax: IRA	<input type="checkbox"/> Tax: State Specific Forms
<input type="checkbox"/> Fulfillment	<input type="checkbox"/> Tax: Alimony	<input type="checkbox"/> Tax: Itemized Deductions	<input type="checkbox"/> Tax: Tax Software Issues (Vendor)
<input type="checkbox"/> GI/VA Loan information	<input type="checkbox"/> Tax: Child & Dependent Care Tax Credit	<input type="checkbox"/> Tax: Misc. Tax Information	
<input type="checkbox"/> Low Income/Social Services	<input type="checkbox"/> Tax: Capital Gains and Losses	<input type="checkbox"/> Tax: Moving (Form 3903)	
<input type="checkbox"/> Military Relocation Information	<input type="checkbox"/> Tax: Child Tax Credit	<input type="checkbox"/> Tax: Multi-State Filing Issues	
<input type="checkbox"/> Non-Eligible Counseling Services	<input type="checkbox"/> Tax: Combat Zone Income	<input type="checkbox"/> Tax: Other Income Issues	

Interpreter Requested
Language:

Referred to Agency

Comments

[Cancel](#) [Save](#) [Done](#)

Figure 3.8

v. **Tax:** Users can click on the Tax link to create a Tax program referral (Figure 3.9).

Tax Services

Tax Referral Options:

State
 Federal

*Point of Contact name *Point of Contact phone

Participant prefers not to be contacted for follow-up

*Handoff Type Assigned to Interpreter Requested
Language

Handoff Notes Urgent

[Cancel](#) [Save](#) [Done](#)

Figure 3.9

- vi. **Specialty Consult:** Users can click on the Specialty link to create a Specialty program referral.

1. Specialty Consult: Special Needs

The screenshot shows the 'Specialty Consult: Special Needs' form in the Military OneSource system. The page header includes the Military OneSource logo and navigation links for SEARCH, PROFILE, and LOGOUT. The left sidebar contains navigation options: DASHBOARD, PARTICIPANT OVERVIEW, and RELATED CASES. The PARTICIPANT OVERVIEW section displays details for 'Mary Jones', including her name, ID (8), current address (123 First Street, Los Angeles, CA 91001), phone number (+034-343-433-4343), and date of birth (2/1/2013). The RELATED CASES section lists links for 'Recovering Warrior', 'Tax Services', and three 'SECO Specialty Consult' entries, with a 'More' link. The main content area is titled 'Specialty Consult: Special Needs' and contains a section for selecting referrals. Below this, there are dropdown menus for 'Handoff Type' and 'Assigned to', and checkboxes for 'Interpreter Requested' and 'Urgent'. A large text area for 'Handoff Notes' is provided, along with 'Cancel', 'Save', and 'Done' buttons. The footer includes 'About Military OneSource | Privacy & Security | Disclaimer | References | Feedback' and the USA.gov logo.

Figure 3.10

2. Specialty Consult: Elder Care

The screenshot shows the 'Specialty Consult: Elder Care' form in the Military OneSource system. The layout is identical to Figure 3.10, with the same header, sidebar, and participant information. The main content area is titled 'Specialty Consult: Elder Care' and contains a section for selecting referrals. The referral options listed are: Counseling, Education, Employment, Exceptional Family Member Program, Facilities, Health Care, Housing, Legal, Military Benefits, Relocation, Respite Care, Transportation, VA Benefit, and Interpreter Requested. The form includes dropdown menus for 'Handoff Type' and 'Assigned to', checkboxes for 'Interpreter Requested' and 'Urgent', a large text area for 'Handoff Notes', and 'Cancel', 'Save', and 'Done' buttons. The footer includes 'About Military OneSource | Privacy & Security | Disclaimer | References | Feedback' and the USA.gov logo.

Figure 3.11

3. Specialty Consult: Adult Disability

The screenshot shows the 'Specialty Consult: Adult Disability' form in the Military OneSource system. The page header includes the Military OneSource logo and navigation links for SEARCH, PROFILE, and LOGOUT. The left sidebar contains a 'PARTICIPANT OVERVIEW' section with details for 'Mary Jones', including her Participant ID (8), current address (123 First Street, Los Angeles, CA 91001), phone number (+034-343-433-4343), and date of birth (2/1/2013). Below this is a 'RELATED CASES' section with links for 'Recovering Warrior', 'Tax Services', and three 'SECO Specialty Consult' entries, along with a 'More' link. The main content area is titled 'Specialty Consult: Adult Disability' and contains a section for selecting referrals. The referrals are organized into three columns of checkboxes: Counseling, Education, Employment, Equipment, Exception Family Member Program, Facilities, Finances, Health Care, Housing, Legal, Military Benefits, Relocation, Respite Care, Transportation, and VA Benefit. Below the referral list is a form for 'Handoff Type' (Please Select), 'Assigned to' (Please Select), and 'Interpreter Requested' (Please Select) with a 'Language' dropdown. There is also an 'Urgent' checkbox and a 'Handoff Notes' text area. At the bottom right of the form are 'Cancel', 'Save', and 'Done' buttons. A vertical sidebar on the right side of the page contains links for 'CRISIS/OTW/WR', 'PROGRAM REFERRALS', and 'RELATED CASES'. The footer includes 'About Military OneSource | Privacy & Security | Disclaimer | References | Feedback' and the USA.gov logo.

Figure 3.12

4. Specialty Consult: Adoption

The screenshot shows the 'Specialty Consult: Adoption' form in the Military OneSource system. The page header includes the Military OneSource logo and navigation links for SEARCH, PROFILE, and LOGOUT. The left sidebar contains a 'PARTICIPANT OVERVIEW' section with details for 'Mary Jones', including her Participant ID (8), current address (123 First Street, Los Angeles, CA 91001), phone number (+034-343-433-4343), and date of birth (2/1/2013). Below this is a 'RELATED CASES' section with links for 'Recovering Warrior', 'Tax Services', and three 'SECO Specialty Consult' entries, along with a 'More' link. The main content area is titled 'Specialty Consult: Adoption' and contains a section for selecting referrals. The referrals are organized into two columns of checkboxes: Counseling, Finances, Home Study Information, Housing, Information, Legal, Military Benefits, and Transportation. Below the referral list is a form for 'Handoff Type' (Please Select), 'Assigned to' (Please Select), and 'Interpreter Requested' (Please Select) with a 'Language' dropdown. There is also an 'Urgent' checkbox and a 'Handoff Notes' text area. At the bottom right of the form are 'Cancel', 'Save', and 'Done' buttons. A vertical sidebar on the right side of the page contains links for 'CRISIS/OTW/WR', 'PROGRAM REFERRALS', and 'RELATED CASES'. The footer includes 'About Military OneSource | Privacy & Security | Disclaimer | References | Feedback' and the USA.gov logo.

Figure 3.13

5. Specialty Consult: Work Life

The screenshot shows the 'Specialty Consult: Work Life' page in the Military OneSource system. The left sidebar contains navigation links for 'DASHBOARD', 'PARTICIPANT OVERVIEW', and 'RELATED CASES'. The 'PARTICIPANT OVERVIEW' section displays details for 'Mary Jones', including her ID (8), current address (123 First Street, Los Angeles, CA 91001), phone number (+034-343-433-4343), and date of birth (2/1/2013). The 'RELATED CASES' section lists links for 'Recovering Warrior', 'Tax Services', and three 'SECO Specialty Consult' entries, with a 'More' link. The main content area is titled 'Specialty Consult: Work Life' and contains a section for selecting referrals. It lists various services with checkboxes: Career, Community Resources, Financial Assistance, Government Program, Household Services, Housing, Legal, Non-Referral General Information, Pets, Official Travel, and Unofficial Travel. Below this is a form for 'Handoff Type' (Please Select), 'Assigned to' (Please Select), 'Interpreter Requested' (checkbox), and 'Language' (Please Select). There is also a 'Handoff Notes' text area with an 'Urgent' checkbox. At the bottom of the form are 'Cancel', 'Save', and 'Done' buttons. The footer includes 'About Military OneSource | Privacy & Security | Disclaimer | References | Feedback' and the USA.gov logo.

Figure 3.14

6. Specialty Consult: Bulk Fulfillment

The screenshot shows the 'Specialty Consult: Bulk Fulfillment' page in the Military OneSource system. The layout is identical to Figure 3.14, with the same sidebar and participant information for 'Mary Jones'. The main content area is titled 'Specialty Consult: Bulk Fulfillment' and contains the same referral selection options and handoff form as seen in Figure 3.14. The 'Handoff Notes' text area is currently empty. The 'Cancel', 'Save', and 'Done' buttons are visible at the bottom of the form. The footer includes 'About Military OneSource | Privacy & Security | Disclaimer | References | Feedback' and the USA.gov logo.

Figure 3.15

- vii. **Health and Wellness Coaching:** Users can click on the Health and Wellness link to create a Health and Wellness Coaching program referral.

Military OneSource
CARE MANAGEMENT SYSTEM

SEARCH PROFILE LOGOUT

Health & Wellness Coaching

DASHBOARD

PARTICIPANT OVERVIEW

Name [Mary Jones](#)

Participant ID 8

Current Address
123 First Street
Los Angeles, CA 91001
United States

Phone +034-343-433-4343

DOB 2/1/2013

RELATED CASES

[Recovering Warrior](#)
[Tax Services](#)
[SECO Specialty Consult](#)
[SECO Specialty Consult](#)
[SECO Specialty Consult](#)
[More](#)

*Coaching Referral Options

*Coaching Delivery

*Coach Name

*Phone

*Email Address

Participant prefers not to be contacted for follow-up

*Handoff Type

Assigned to

Interpreter Requested

Language

Handoff Notes

Urgent

[Cancel](#) [Save](#) [Done](#)

USA.gov

Figure 3.16

- viii. **Recovering Warrior:** Users can click on the Recovering Warrior link to create a Recovering Warrior program referral.

Military OneSource
CARE MANAGEMENT SYSTEM

SEARCH PROFILE LOGOUT

Specialty Consult: Recovering Warrior

DASHBOARD

PARTICIPANT OVERVIEW

Name [Mary Jones](#)

Participant ID 8

Current Address
123 First Street
Los Angeles, CA 91001
United States

Phone +034-343-433-4343

DOB 2/1/2013

RELATED CASES

[Recovering Warrior](#)
[Tax Services](#)
[SECO Specialty Consult](#)
[SECO Specialty Consult](#)
[SECO Specialty Consult](#)
[More](#)

Select the referrals needed for the participant below:

Counseling Health Care Transportation

Education Housing VA Benefit

Employment Legal Veteran

Facilities Military Benefits

Finances Respite Care

*Handoff Type

Assigned to

Interpreter Requested

Language

Handoff Notes

Urgent

[Cancel](#) [Save](#) [Done](#)

USA.gov

Figure 3.17

- ix. **Document Translation:** Users can click on the Document Translation link to create a Document Translation program referral.

Document Translation

Documents

Document Type* From Language* No. of Pages*

Details of Other To Language*

Document will be delivered via: Document will be returned via:

*Handoff Type Assigned to Interpreter Requested Language

Urgent

Handoff Notes

Figure 3.18

- x. **Related Cases:** All of a participant's cases will be located on the Related Cases tab.

Related Cases

Case Id	Case Name	Date Opened	Date Modified	Status
33	SECO Triage	8/30/2012	8/30/2012 10:32:11 AM	Closed
34	SECO Specialty Consult	8/30/2012	2/15/2013 8:21:01 AM	Active
35	Non-Medical Counseling	8/30/2012	8/30/2012 10:35:25 AM	Closed
58	Non-Medical Counseling	9/12/2012	9/12/2012 2:51:08 PM	Active
108	SECO Triage	9/27/2012	9/27/2012 12:11:10 PM	Closed
109	SECO Triage	9/27/2012	12/29/2012 12:36:37 PM	Closed
145	SECO Triage	10/24/2012	10/24/2012 3:06:46 PM	Closed
146	SECO Specialty Consult	10/24/2012	11/21/2012 11:11:11 AM	Closed
149	Non-Medical Counseling	10/24/2012	10/24/2012 3:22:46 PM	Closed
205	Specialty Consult: Bulk Fulfillment	11/21/2012	11/21/2012 11:20:23 AM	Active
206	SECO Specialty Consult	11/21/2012	12/31/2012 7:49:31 AM	Active
208	Document Translation	11/21/2012	11/21/2012 11:15:34 AM	Active
274	SECO Specialty Consult	12/29/2012	1/9/2013 7:27:00 AM	Active
306	SECO Triage	1/30/2013	1/30/2013 12:59:25 PM	Closed
316	SECO Specialty Consult	1/31/2013	2/15/2013 8:12:58 AM	Closed
327	SECO Triage	2/5/2013	2/19/2013 5:11:08 PM	Closed

Figure 3.19

- d. **Quick Tracker:** Documents quick information requests such as directions for local fast food, contact information for base resources, or if the caller dialed the wrong number.

Figure 4.1

- e. **Crisis/DTW/MR:** Crisis, duty to warn / mandated report, or adverse incident call (“crisis call”).

- i. **Crisis/DTW/MR:** Empty field

Figure 5.1

- ii. **Crisis/DTW/MR:** Prompt that asks if the user would like to attach the Crisis Call to the participant record that the Search screen located (user with same name).

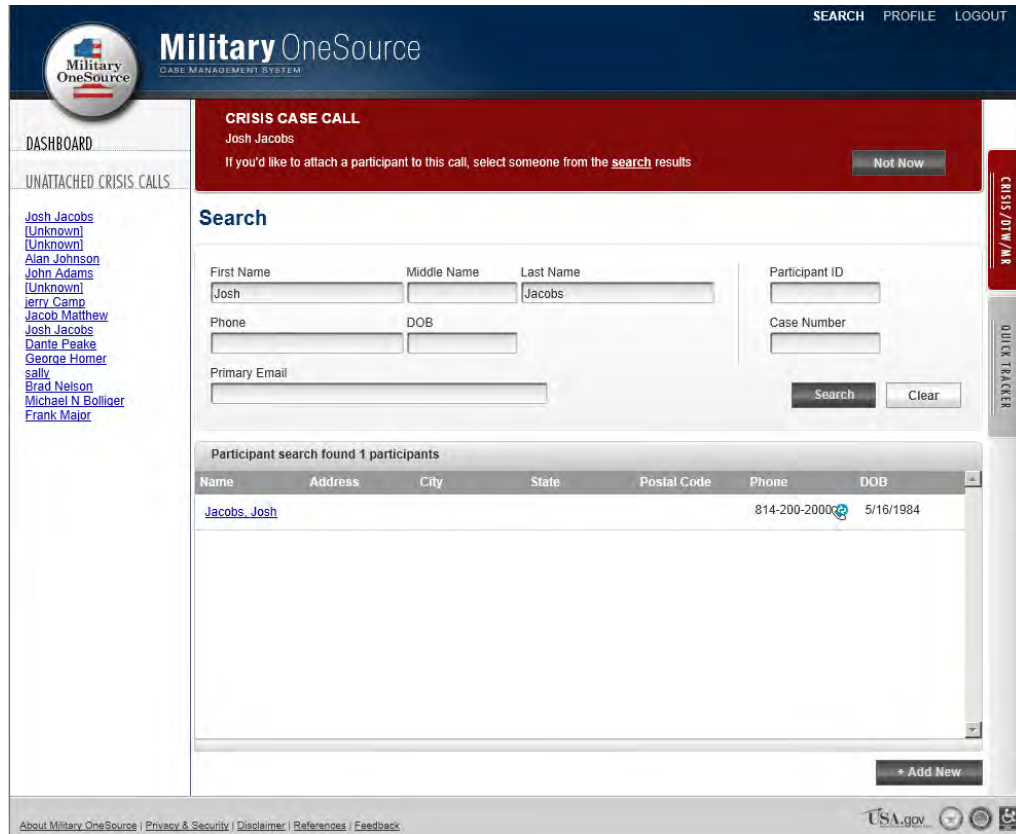


Figure 5.2

- iii. **Crisis/DTW/MR:** Prompt that asks if the user would like to attach the Crisis Call to the participant (from View Participant screen).

Military OneSource
CARE MANAGEMENT SYSTEM

SEARCH PROFILE LOGOUT

CRISIS CASE CALL
Josh Jacobs
Attach this person to a crisis call?

View Participant

Participant Name and Information

First	Middle	Last	Suffix
Josh		Jacobs	

DOB: 5/16/1984 Gender: Male Marital Status: Single

Current Address

Address: _____
City: _____ State: _____ Postal Code: _____
Country: _____

Mailing Address

Address: _____
City: _____ State: _____ Postal Code: _____
Country: _____

Telephone

Preferred Phone: 814-200-2000 Work Phone: _____ Cell Phone: _____

Email

Email Address: josh.jacobs@abc.com

Additional Information

Requires Interpreter: No Referred By: _____

Eligibility Info

Service Member? Yes
Relation: Self
Pay Grade: E-6
Branch of SVC: Air National Guard
Eligibility Status: Active Duty

USA.gov

Figure 5.3

- iv. **Unattached Crisis Calls:** Crisis calls that have not been attached to a participant’s record. Users can attach the Crisis Calls by clicking on the call from the “Unattached Crisis Calls” list and clicking on the “Attach” button (Figure 5.4).

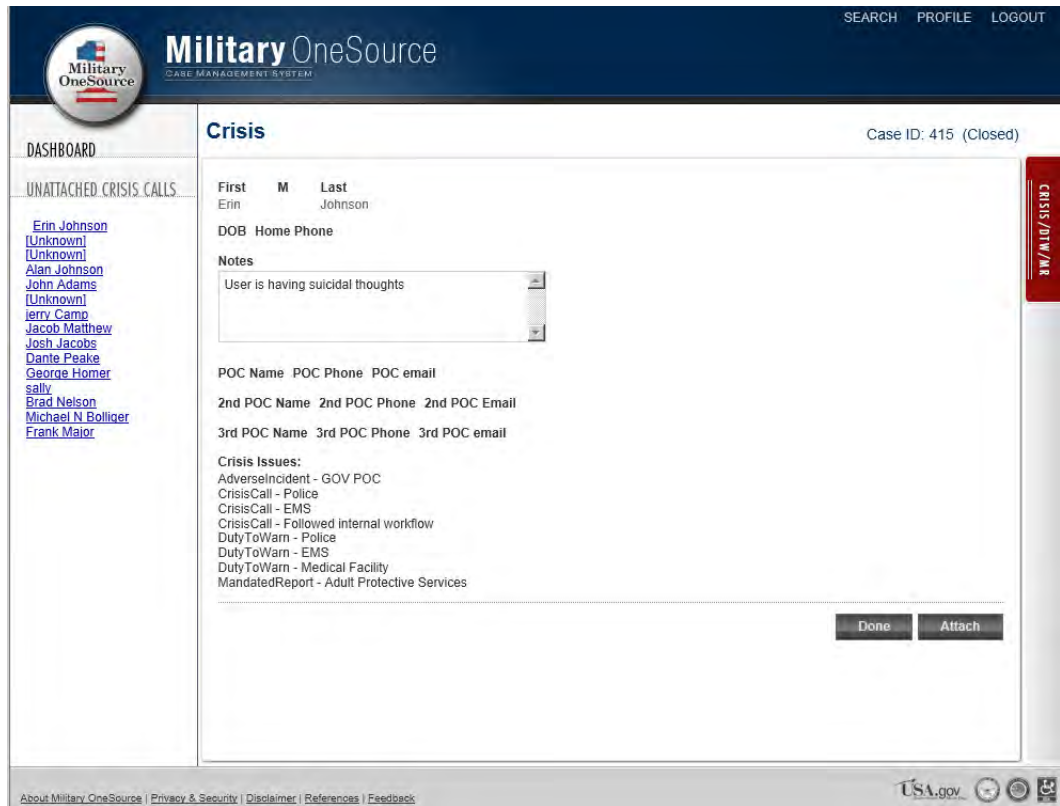


Figure 5.4

f. **Managing Cases**

- i. **My Dashboard:** Depending on access level, users will see a combination of the following: Unassigned cases, Stale Cases, My Assigned Cases, Crisis Calls to Associate, Follow Ups, and Expired.

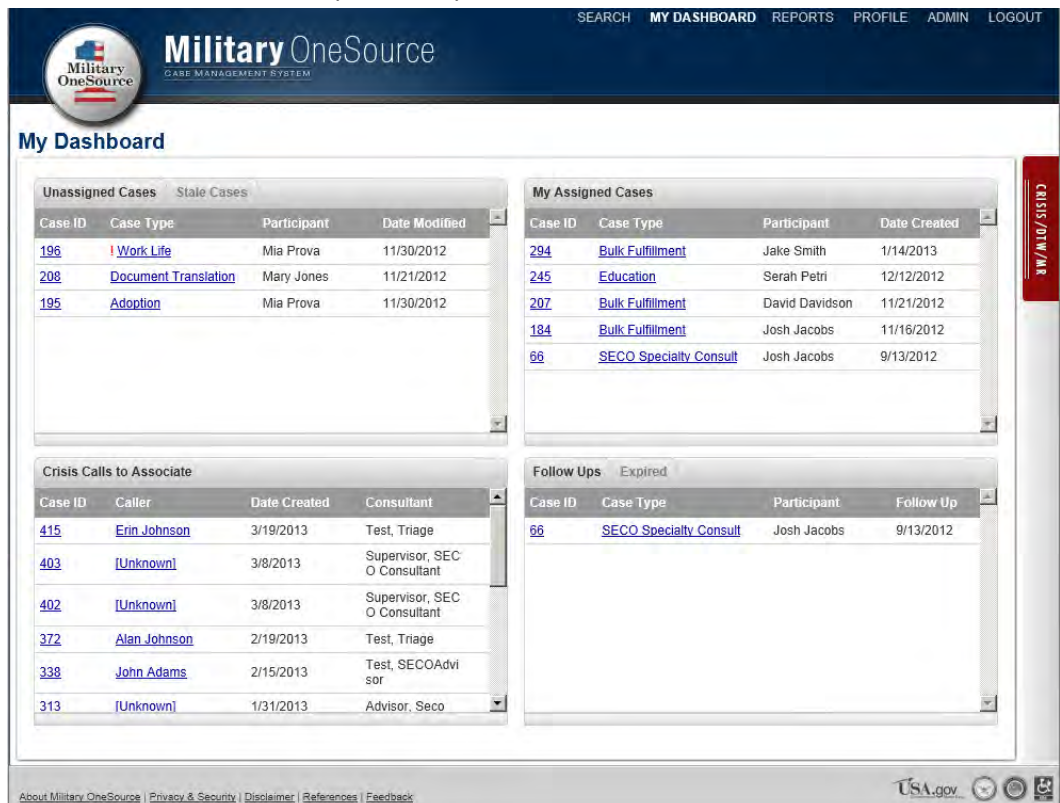


Figure 6.1

ii. **SECO:** SECO Advisors, SECO Specialty Consultants and SECO Specialty Consultant Supervisors will be able to work with SECO Triage cases and SECO Specialty Consult Cases.

1. **SECO Triage:** SECO Advisors will open the SECO Triage cases and decide if it was an Information and Referral case or a SECO Specialty Consult case.

Military OneSource CASE MANAGEMENT SYSTEM

SEARCH MY DASHBOARD PROFILE LOGOUT

SECO Triage Case ID: 418 (Active)

DASHBOARD

PARTICIPANT OVERVIEW

Name: [Patrick Jones](#)

Participant ID: 5

Current Address: 340 Broadway, San Diego, CA 92415, United States

Phone: 450-984-5011

DOB: 8/3/1987

RELATED CASES

[Tax Services](#)
[SECO Triage](#)
[Document Translation](#)
[Education](#)
[Special Needs](#)

[More](#)

[My Dashboard](#)

Handoff Type Assigned to: SECOAdvisor Test

Language Interpreter Requested

Handoff Notes Urgent

Date and Time of Call: Wednesday, March 20, 2013 6:57 AM

Service Member Name: Steve Holden

MyCAA Eligible
 MyCAA Registered
 MyCAA Participant
 MSEP Registered
 MyCAA Mandatory Counseling Complete

SECO Service Request (select all that apply)

SECO Information & Referral

SECO I&R

Categories <input type="checkbox"/> Career Connection <input type="checkbox"/> Career Exploration <input type="checkbox"/> Education and Training <input type="checkbox"/> Employment Readiness <input type="checkbox"/> Tech Help <input type="checkbox"/> Other	Tech Help Provided For <input type="checkbox"/> Career Site <input type="checkbox"/> MSEP Portal <input type="checkbox"/> MyCAA Portal <input type="checkbox"/> SECO Web Presence <input type="checkbox"/> Software Assistance <input type="checkbox"/> USA Jobs <input type="checkbox"/> Other	Referred To <input type="checkbox"/> DOE college search <input type="checkbox"/> Financial Aid <input type="checkbox"/> GI Bill referral <input type="checkbox"/> Hiring Our Heroes <input type="checkbox"/> Installation Employment Services <input type="checkbox"/> Institution Career Center <input type="checkbox"/> MilSpouse eMentoring <input type="checkbox"/> MSEP <input type="checkbox"/> State Career One Stop Center <input type="checkbox"/> USAJOBS <input type="checkbox"/> Other
--	---	--

Comments

SECO Specialty Consult

SECO Specialty Consult

Handoff Type: Please Select Assigned To: Please Select

Follow Up Date: Followup Time: Followup Reason: Clear

Handoff Notes Urgent

Cancel Save Done

CRISIS CENTER PROGRAM REFERRALS RELATED CASES

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Figure 7.1

2. **SECO Specialty Consult:** SECO Specialty Consultants will manage the SECO Specialty Consult cases from his/her “My Assigned Cases” area on the “My Dashboard” page.

Military OneSource CASE MANAGEMENT SYSTEM

SEARCH MY DASHBOARD REPORTS PROFILE LOGOUT

SECO Specialty Consult Case ID: 387 (Active)

DASHBOARD

PARTICIPANT OVERVIEW

Name: [Adam Jacobs](#)
 Participant ID: 48
 Current Address: 452 Penny Lane, Alexandria, VA 22311, United States
 Phone: 154-154-5454
 DOB: 3/12/1986

RELATED CASES

[Bulk Fulfillment](#)
[SECO Specialty Consult](#)

[My Dashboard](#)

Handoff Type Assigned to: SECOspecCon Test
 Handoff Notes: Urgent

Language
 Interpreter Requested
 Please Select

Follow Up Date 2/22/2013 **Follow Up Time** 9:30am **Follow Up Reason** Clear

Participant Information

Registered for Mentoring Program
 BPW
 Academy Women
 Other Program
 Referred to Mentoring Program
 BPW
 Academy Women
 Other Program

Education

Currently Enrolled in School
 Currently Using MyCAA Scholarship
 Not Interested in Going to School at this Time

Highest Level of Education Please Select
Type of Degree Please Select

Date of Last Class Completion

Certifications [add](#) **Licenses** [add](#)

Work Experience

Currently Employed Currently Unemployed But Looking Currently Unemployed But Not Looking

Full-time Not Eligible for Employment Compensation
 Part-time Collecting Unemployment Compensation
 Seasonal Exhausted Unemployment Compensation
 Virtual Referred for Unemployment Compensation

Last Date of Employment

Career Level Please Select **Industry Type** Please Select

Position **Company** MSEP Position

Wage
 Monthly Gross Earnings for Spouse Income ONLY
Current Wage Range Please Select **Previous Wage Range (prior to last relocation)** Please Select

SECO Counseling Services
 Please Select

Education and Career Goals

1. Please Select
 2. Please Select
 3. Please Select

Session Notes

Case Closing Summary

Contact Notes [add](#)

Completed

Cancel Save Done

USA.gov

Figure 7.2

- iii. **Specialty Consultant:** Specialty Consultants and Specialty Consultant Supervisors will manage the Specialty Consultant cases assigned to them using the “My Dashboard” page.

1. Specialty Consult: Tax Services

The screenshot displays the Military OneSource web application interface for managing a Tax Services case. The header includes the Military OneSource logo and navigation links: SEARCH, MY DASHBOARD, REPORTS, PROFILE, and LOGOUT. The main content area is titled "Tax Services" and shows "Case ID: 419 (Active)".

Participant Overview:

- Name: Patrick Jones
- Participant ID: 5
- Current Address: 340 Broadway, San Diego, CA 92415, United States
- Phone: 450-984-5011
- DOB: 8/3/1987

Related Cases:

- Tax Services
- SECO Triage
- Document Translation
- Education
- Special Needs

Case Details:

- Handoff Type: Assigned to (SpecCon Test)
- Language: Interpreter Requested (Please Select)
- Tax Services Selections: Change Selection (State: Federal)
- Handoff Notes: [Empty text area]
- Urgent:
- Date and Time of Call: Wednesday, March 20, 2013 7:09 AM
- *Point of Contact name: Mike Rosa
- *Point of Contact phone: 451-254-1548
- Participant prefers not to be contacted for follow-up:
- Follow Up Date: [Date field]
- Follow Up Reason: [Text field]
- Notes: [Empty text area]
- Case Closing Summary: [Empty text area]
- Contact Notes: [Empty text area]
- Completed:

Buttons at the bottom: Cancel, Save, Done.

Figure 8.1

2. Specialty Consult: Special Needs

SEARCH MY DASHBOARD REPORTS PROFILE LOGOUT

Military OneSource
CARE MANAGEMENT SYSTEM

Specialty Consult: Special Needs Case ID: 423 (Active)

DASHBOARD

PARTICIPANT OVERVIEW

Name: [Moham Brandle](#)

Participant ID: 45

Current Address

Phone

DOB

RELATED CASES

[Special Needs](#)

[My Dashboard](#)

Handoff Type Assigned to: Warm Handoff SpecCon Test

Language
 Interpreter Requested
Please Select

Special Needs Selections [Change Selection](#)
Counseling
Education
Employment
Exceptional Family Member Program
Facilities

Handoff Notes Urgent

Date and Time of Call: Wednesday, March 20, 2013 7:18 AM

Services are for:
 Self
 Family Member

First: Mid: Last: Suffix: DOB: [Date Picker]

Address: [Text Field]

City: State: Postal Code: Country: [Please Select]

Receiving other services? Describe services required Agency Referral(s): [Please Select]

Plan of action: [Text Area]

Follow Up Date: [Date Picker] Follow Up Reason: [Text Field] Clear

Case Closing Summary: [Text Area]

Notes: [Text Area]

Closing Reason: [Please Select]

Completed

Contact Notes: [add](#)

[Cancel](#) [Save](#) [Done](#)

CRISIS/DIWR PROGRAM REFERRALS RELATED CASES

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Figure 8.2

3. Specialty Consult: Elder Care

SEARCH MY DASHBOARD REPORTS PROFILE LOGOUT

Military OneSource
CASE MANAGEMENT SYSTEM

Specialty Consult: Elder Care Case ID: 424 (Active)

DASHBOARD

PARTICIPANT OVERVIEW

Name
[Adam Hornick](#)

Participant ID
41

Current Address
123 Crystal Drive
Alexandria, VA 22311
United States

Phone
123-456-7898

DOB
4/9/1970

RELATED CASES

[Elder Care](#)
[SECO Specialty Consult](#)
[SECO Triage](#) [More](#)

[My Dashboard](#)

Handoff Type Assigned to: Warm Handoff | SpecCon Test

Language
 Interpreter Requested
Please Select

Elder Care Selections [Change Selection](#)
Counseling
Education
Equipment
Facilities
Finances

Handoff Notes Urgent

Date and Time of Call: Wednesday, March 20, 2013 7:29 AM

Services are for: Self Family Member

First: [] Mid: [] Last: [] Suffix: [] DOB: []

Address: []

City: [] State: [] Postal Code: [] Country: []

Receiving other services? [] Describe services required: [] Agency Referral(s): []

Plan of action: []

Follow Up Date: [] Follow Up Reason: []

Case Closing Summary: [] Notes: []

Closing Reason: [] Completed

Contact Notes: [add](#)

CRISIS /DW/MR PROGRAM REFERRALS RELATED CASES

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Figure 8.3

4. Specialty Consult: Education

SEARCH MY DASHBOARD REPORTS PROFILE LOGOUT

Military OneSource
CARE MANAGEMENT SYSTEM

Specialty Consult: Education Case ID: 398 (Active)

DASHBOARD

PARTICIPANT OVERVIEW

Name
[Patrick Jones](#)

Participant ID
5

Current Address
340 Broadway
San Diego, CA 92415
United States

Phone
450-984-5011

DOB
8/3/1987

RELATED CASES

[Tax Services](#)
[SECO Triage](#)
[Document Translation](#)
[Education](#)
[Special Needs](#)

[More](#)

[My Dashboard](#)

Handoff Type Assigned to
Warm Handoff

Handoff Notes Urgent

Language
 Interpreter Requested

Education Selections [Change Selection](#)
Pre-School
Middle School
High School

Date and Time of Call: Tuesday, March 05, 2013 2:12 PM

Services are for:

Self

Family Member

First Mid Last Suffix DOB

Address

City State Postal Code Country

Receiving other services?

Describe services required

Agency Referral(s)

Plan of action

Follow Up Date Follow Up Reason

Case Closing Summary

Notes

Closing Reason

Completed

Contact Notes [add](#)

CRISIS/OTW/MR
PROGRAM REFERRALS
RELATED CASES

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Figure 8.4

5. Specialty Consult: Adult Disability

SEARCH MY DASHBOARD REPORTS PROFILE LOGOUT

Military OneSource
CARE MANAGEMENT SYSTEM

Case ID: 426 (Active)

Specialty Consult: Adult Disability

DASHBOARD

PARTICIPANT OVERVIEW

Name: [Jane Jones](#)

Participant ID: 24

Current Address:

Phone:

DOB:

RELATED CASES

[Adoption](#)

[Adult Disability](#)

[Financial Counseling](#)

[Bulk Fulfillment](#)

[My Dashboard](#)

Handoff Type Assigned to: SpecCon Test

Warm Handoff

Language

Interpreter Requested

Please Select

Adult Disability Selections [Change Selection](#)

Counseling

Education

Employment

Handoff Notes Urgent

Date and Time of Call: Wednesday, March 20, 2013 7:31 AM

Services are for:

Self

Family Member

First: Mid: Last: Suffix: DOB:

Address:

City: State: Postal Code: Country:

Receiving other services? Describe services required Agency Referral(s):

Plan of action:

Follow Up Date: Follow Up Reason: Clear

Case Closing Summary

Notes

Closing Reason: Please Select

Completed

Contact Notes [add](#)

[Cancel](#) [Save](#) [Done](#)

CRISIS / DM / MR PROGRAM REFERRALS RELATED CASES


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Figure 8.5

6. Specialty Consult: Adoption

SEARCH MY DASHBOARD REPORTS PROFILE LOGOUT



Military OneSource

CASE MANAGEMENT SYSTEM

Specialty Consult: AdoptionCase ID: 427 (Active)

DASHBOARD

PARTICIPANT OVERVIEW

Name
[Jane Jones](#)

Participant ID
24

Current Address

Phone

DOB

RELATED CASES

[Adoption](#)
[Adult Disability](#)
[Financial Counseling](#)
[Bulk Fulfillment](#)

[My Dashboard](#)

Handoff Type Assigned to
Warm Handoff SpecCon Test

Language
 Interpreter Requested
Please Select

Adoption Selections [Change Selection](#)
Finances
Home Study Information

Handoff Notes Urgent

Date and Time of Call: Wednesday, March 20, 2013 7:32 AM

Services are for:

Self

Family Member

First	Mid	Last	Suffix	DOB
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Address

City	State	Postal Code	Country
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Receiving other services?	Describe services required	Agency Referral(s)
<input type="text"/>	<input type="text"/>	<input type="text"/>

Plan of action

Follow Up Date **Follow Up Reason**

Case Closing Summary	Notes
<input type="text"/>	<input type="text"/>

Closing Reason

Completed


Contact Notes [add](#)

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Figure 8.6

7. Specialty Consult: Work Life

SEARCH MY DASHBOARD REPORTS PROFILE LOGOUT

 **Military OneSource**
CASE MANAGEMENT SYSTEM

Specialty Consult: Work Life Case ID: 428 (Active)

DASHBOARD

PARTICIPANT OVERVIEW

Name: [Mark Johnson](#)

Participant ID: 43

Current Address: 1040 Bethel Street, Alexandria, VA 22311, United States

Phone: 452-658-9658

DOB: 8/8/1979

RELATED CASES

[Work Life](#)
[SECO Specialty Consult](#)
[SECO Specialty Consult](#)
[More](#)

[My Dashboard](#)

Handoff Type Assigned to: Warm Handoff | SpecCon Test

Language
 Interpreter Requested
Please Select

Work Life Selections [Change Selection](#)
Career
Community Resources
Financial Assistance

Handoff Notes: Urgent

Date and Time of Call: Wednesday, March 20, 2013 7:34 AM

Services are for:

Self
 Family Member

First: [] Mid: [] Last: [] Suffix: [] DOB: []

Address: []

City: [] State: [] Postal Code: [] Country: []

Receiving other services?: [] Describe services required: [] Agency Referral(s): []

Plan of action: []

Follow Up Date: [] Follow Up Reason: [] Clear

Case Closing Summary: [] Notes: []

Closing Reason: []

Completed

Contact Notes: [add](#)

Cancel Save Done


CRISIS/DM/MA PROGRAM REFERRALS RELATED CASES

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USA.gov

Figure 8.7

8. Specialty Consult: Bulk Fulfillment



Military OneSource
GABE MANAGEMENT SYSTEM

[SEARCH](#) [MY DASHBOARD](#) [REPORTS](#) [PROFILE](#) [LOGOUT](#)

DASHBOARD

PARTICIPANT OVERVIEW

Name
[Adam Jacobs](#)

Participant ID
48

Current Address
452 Penny Lane
Alexandria, VA 22311
United States

Phone
154-154-5454

DOB
3/12/1996

CURRENT REFERRALS

[Bulk Fulfillment](#)

[My Dashboard](#)

Specialty Consult: Bulk Fulfillment

Case ID: 429 (Active)

Handoff Type Assigned to
Warm Handoff SpecCon Test

Language
 Interpreter Requested
Please Select

Handoff Notes Urgent

Date and Time of Call: Wednesday, March 20, 2013 7:36 AM

Service Provider Information

Affiliation Please Select Phone

Email

Address

City State -- Postal Code Country Please Select

Organization Affiliation (select all that apply)

Command Representative

Family Service Center

Family Readiness Representative

Office of Survivor Assistance

Ombudsman

Materials General Information

Service Branch these are for? (select all that apply)

Air Force

Army

Civilian Expeditionary

Coast Guard

Marines

National Guard Air

National Guard Army

Navy

Status

Active Duty

Activated Coast Guard with Navy

Activated National Guard Air

Activated National Guard Army

Activated Reserves

This is for an event. Event type Please Select

Event Name

Materials will be provided to? **Date items are required**

Family Members 15

Service Members

Service Providers

Follow Up Date 15 Follow Up Reason Clear

Case Closing Summary

Completed

Contact Notes [add](#)


Cancel Save Done

CRISIS/DIV/MAR PROGRAM REFERRALS RELATED CASES

Figure 8.8

9. Specialty Consult: Recovering Warrior

SEARCH MY DASHBOARD REPORTS PROFILE LOGOUT

 **Military OneSource**
CASE MANAGEMENT SYSTEM

Specialty Consult: Recovering Warrior Case ID: 420 (Active)

DASHBOARD

PARTICIPANT OVERVIEW

Name
[Harry Arnold](#)

Participant ID
25

Current Address
12234 Wonder Lane
Fairfax, VA 22030
United States

Phone
730-876-1234

DOB
10/4/1983

RELATED CASES

[Recovering Warrior Eider Care](#)

[My Dashboard](#)

Handoff Type Assigned to
Warm Handoff SpecCon Test

Handoff Notes Urgent

Language
 Interpreter Requested
Please Select

Recovering Warrior Selections [Change Selection](#)
Counseling
Education

Date and Time of Call: Wednesday, March 20, 2013 7:12 AM

Services are for:

Self

Family Member

First Mid Last Suffix DOB

Address

City State Postal Code Country

Receiving other services? Describe services required Agency Referral(s)

Plan of action

Follow Up Date Follow Up Reason

Case Closing Summary Notes

Closing Reason

Completed

Case outside of 96 hours compliance for action plan

Contact Notes [add](#)

[Cancel](#) [Save](#) [Done](#)

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CRISIS /OTW/MR
PROGRAM REFERRALS
RELATED CASES

Figure 8.9

10. Specialty Consult: Document Translation

SEARCH MY DASHBOARD REPORTS PROFILE LOGOUT

Military OneSource
CASE MANAGEMENT SYSTEM

Case ID: 422 (Active)

Document Translation

Handoff Type Assigned to: Warm Handoff | SpecCon Test | Urgent

Language
 Interpreter Requested
Please Select

Required document turnaround time
1-4 pages: 3 business days
5-9 pages: 3-4 business days
10-19 pages: 3-6 business days
20+ pages: 5+ business days

Date and Time of Call: Wednesday, March 20, 2013 7:16 AM

Follow Up Date: | Follow Up Reason: | Clear

Document Type* Birth Certificate | **From Language*** English | **No. of Pages*** 1

Other Document Type | **To Language*** German

Document will be delivered via: Email | Document will be returned via: Email | Date received: | Date mailed: |

Translated document was received by participant
 Document no longer needs translation

Completed

Contact Notes: add

Cancel Save Done

USA.gov

Figure 8.10

- g. **Reports:** Reports are accessed level based, and depending on the user, he/she will see a combination of the reports below.

Military OneSource
CASE MANAGEMENT SYSTEM

SEARCH MY DASHBOARD **REPORTS** PROFILE ADMIN LOGOUT

Reports

Your permissions allow you to run the following reports:

- [Crisis - DTW - MR Details Report](#)
- [Crisis - DTW - MR Internal Summary Report](#)
- [Case Demographics Report](#)
- [SECO Participant Demographics Report](#)
- [Session Demographics Report](#)
- [Quick Call Categories](#)

CRISIS / DTW / MR

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Figure 9.1

i. **Crisis-DTW-MR Details Report**

Military OneSource
CASE MANAGEMENT SYSTEM

SEARCH MY DASHBOARD **REPORTS** PROFILE ADMIN LOGOUT

Run Report - Crisis - DTW - MR Details Report

[Back to Reports](#)

Start Date: 2/18/2013 End Date: 2/28/2013

1 of 1 100%

Crisis - DTW - MR Details Report

2/18/2013 to 2/28/2013

Branch	Eligibility Status	Rank	Sex	Date Of Birth	Service Member	Relationship	Participant Address	Case Items
Air Force	Active Duty	E-5	Male	02/13/1986	Y	Self	652 Charlotte Avenue; Alexandria, VA 22311; United States	AdverseIncidi CrisisCall: Tr Required CrisisCall: Pol CrisisCall: EM DutyToWarn: DutyToWarn: MandatedRep Protective Se
Navy	Active Duty	W-5	Male	04/09/1970	Y	Self	123 Crystal Drive; Alexandria, VA 22311; United States	AdverseIncidi CrisisCall: Tr Required DutyToWarn:
Air National Guard	Retiree	O-8	Male	03/13/1989	N	Family Member Dependent Child	Unknown	AdverseIncidi MandatedRep Protective Se
Unknown	Unknown	Unknown	Unknown	Unknown	Unknown	Unknown	Unknown	AdverseIncidi CrisisCall: Tr Required CrisisCall: EM DutyToWarn:
Army	Active Duty	W-2	Male	02/07/1986	Y	Self	125 Pine Street; Alexandria, VA 22311; United States	AdverseIncidi CrisisCall: EM DutyToWarn:

Printed: 3/21/2013 12:05:33 PM

Sensitive - For Official Use Only

CRISIS / DTW / MR

USA.gov

Figure 9.2

ii. Crisis-DTW-MR Internal Summary Report

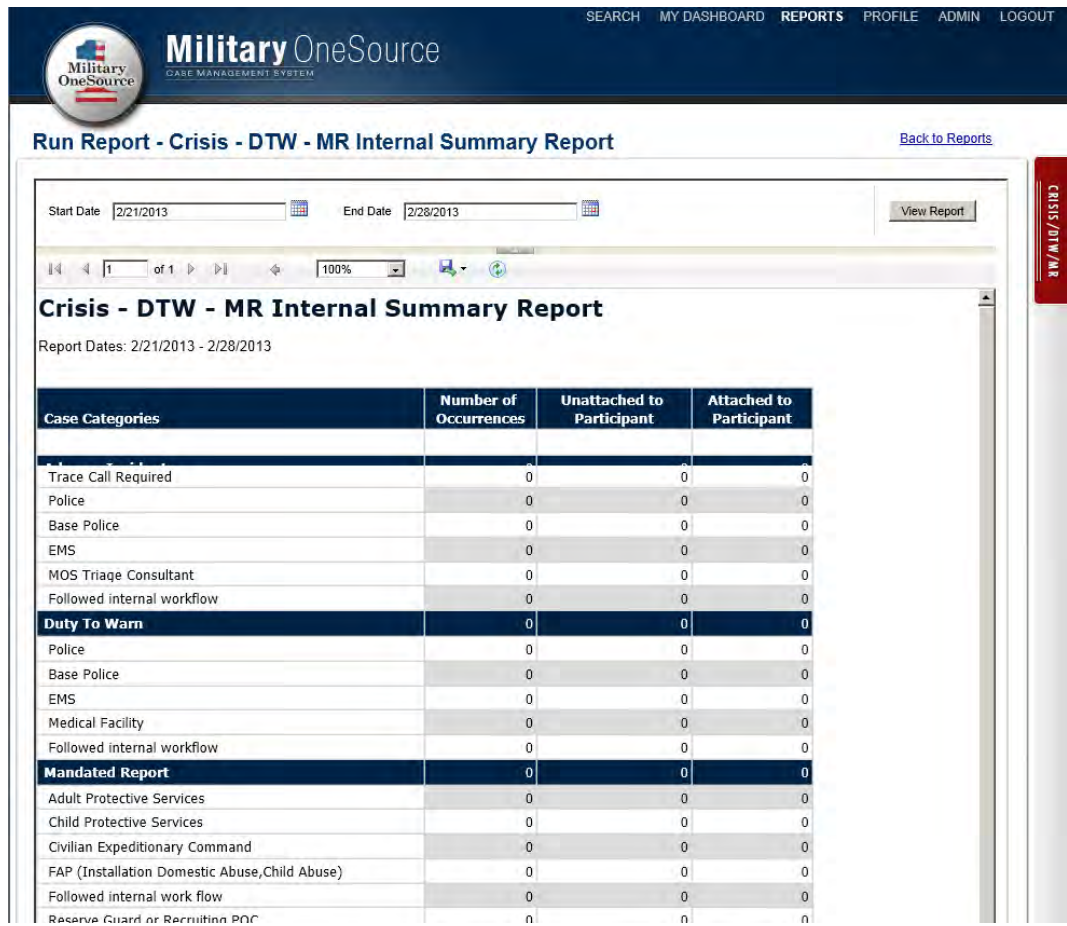


Figure 9.3

iii. Case Demographics Report

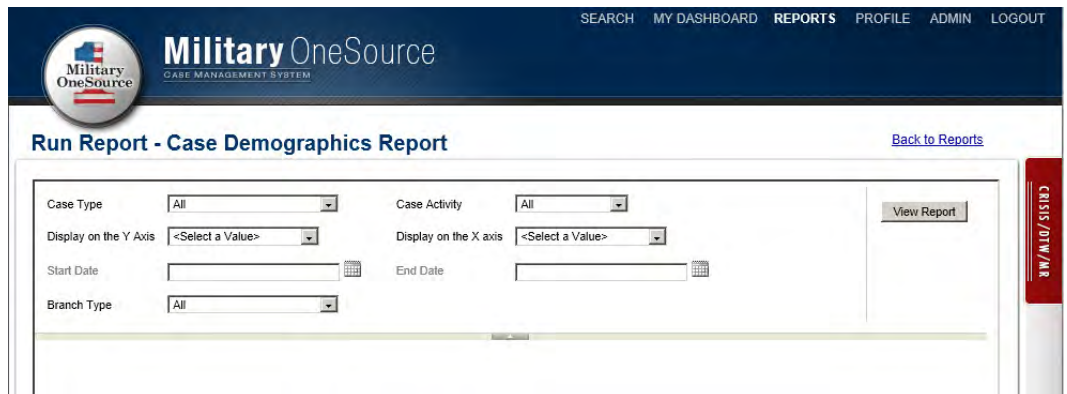


Figure 9.4

iv. SECO Participant Demographics Report

Figure 9.5

v. Session Demographics

Figure 9.6

vi. Quick Call Categories

Quick Call Categories	Total
Base Resources	8
DSN Number	4
Local Fast Food	4
Taxi Service	3

Figure 9.7

- h. **Administration:** Users with Administrator access have access to a Control where he/she can perform basic administration duties.

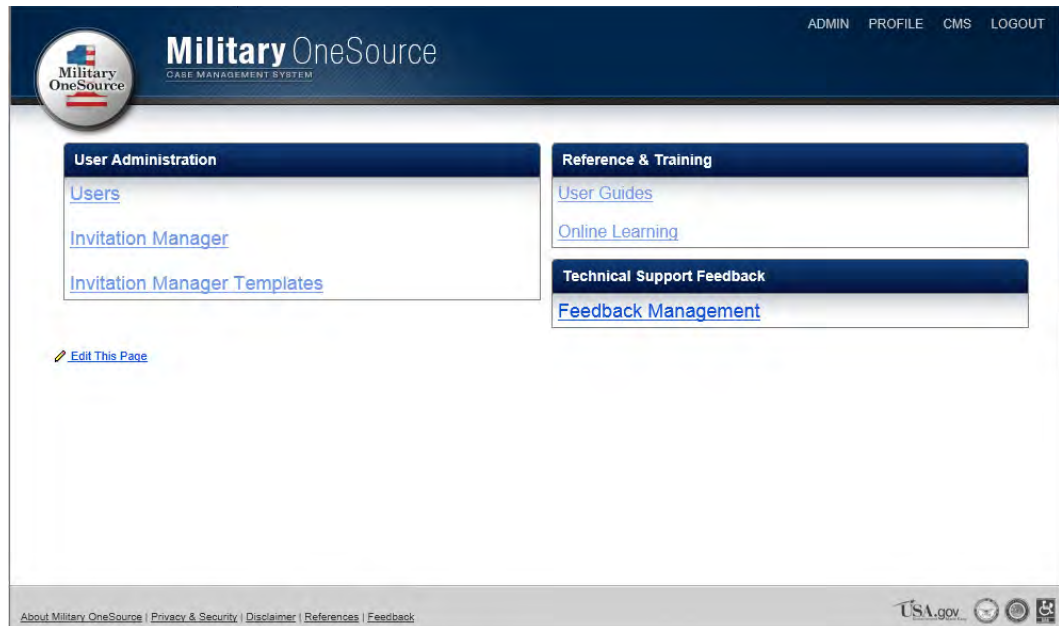


Figure 10.1

- i. **User Module:** Administrators can access the “User” module to look up user profile information, reset passwords, and unlock disabled accounts.

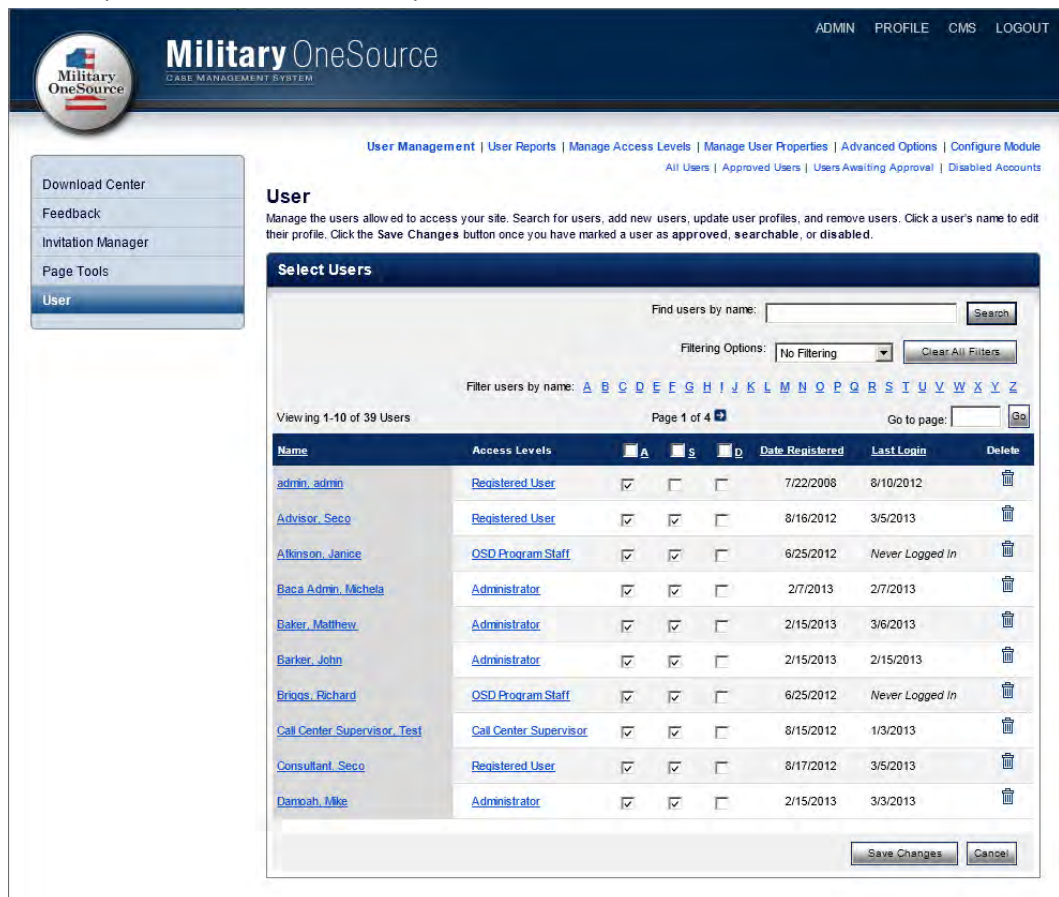


Figure 10.2

1. **View User Profile:** Administrators can view a user profile by clicking on the individual's name.

Military OneSource
CASE MANAGEMENT SYSTEM

CONTROL PANEL ADMIN PROFILE CMS LOGOUT

View Profile

View your profile information.

First Name admin
Last Name admin
Username admin
Password *****
Preferred Greeting Name
Email notification_prd_moscms@defenseweb.com
Address
Address cont.
City or Town
State or Province
Country
Zip or Postal Code

Login Information

Last Login Date 8/10/2012 3:54 PM
Last Login IP 76.79.211.2
Last Failed Login Date 3/5/2013 8:11 AM
Last Failed Login IP 72.184.136.53

[Edit](#) [Reset Password](#) [Return](#)

[About Military OneSource](#) | [Privacy & Security](#) | [Disclaimer](#) | [References](#) | [Feedback](#)

USA.gov

Figure 10.3

2. **Edit User Profile:** Administrators can edit a user's profile by clicking on the "Edit" button on the "View Profile" page.

Military OneSource
CASE MANAGEMENT SYSTEM

CONTROL PANEL ADMIN PROFILE CMS LOGOUT

Update Profile

Use this form to update your profile.

* First Name
* Last Name
Greeting Name
* Email
Address
Address cont.
City or Town
State or Province
Country
Zip or Postal Code

Login Information

Last Login Date 8/10/2012 3:54 PM
Last Login IP 76.79.211.2
Last Failed Login Date 3/5/2013 8:11 AM
Last Failed Login IP 72.184.136.53

[Save](#) [Cancel](#)

[About Military OneSource](#) | [Privacy & Security](#) | [Disclaimer](#) | [References](#) | [Feedback](#)

USA.gov

Figure 10.4

- ii. **Invitation Manager:** Administrators can invite others to the Military OneSource CMS by clicking on the “Invitation Manager” link on the “Admin” page.

The screenshot shows the 'Invitation Manager' page in the Military OneSource CMS. The page header includes the Military OneSource logo and navigation links for ADMIN, PROFILE, CMS, and LOGOUT. The main content area is titled 'Invitation Manager' and includes a sub-header 'Create new invitation to a specific invitee.' Below this, there are three main sections: 1. '* Invitee's Email List' with an empty text area and a '5000 of 5000 characters remaining' indicator. 2. '* Invitation Subject' with a text box containing 'User Account Creation Invitation'. 3. '* Invitation Email Body' with a text area containing a pre-written invitation message: 'You have been invited to create a user account on the Military OneSource Case Management System. Please click the link below to accept the invitation and create your user profile. You will be notified once your account has been activated. If you believe you have received this invitation in error, please contact support@militaryonesource.mil. Thank you, MOS System Administration'. Below the email body is a '1001 of 2000 characters remaining' indicator. At the bottom of the form is a section '* Access Levels Granted to the invitee' with a list of roles and their corresponding checkboxes: Administrator, Call Center Supervisor, Clinical Network Manager, Developer, Network Manager, OSD Program Staff, Quality Assurance and Auditors Vendor, Registered User, SECO Advisor, SECO Specialty Consultant, SECO Specialty Consultant Supervisor, Special Consultant Supervisor, Specialty Consultant, Triage Consultant, and Vendor Program Manager. At the bottom right of the form are three buttons: 'Spell Check', 'Send', and 'Cancel'. The footer of the page contains links for 'About Military OneSource', 'Privacy & Security', 'Disclaimer', 'References', and 'Feedback', along with the USA.gov logo and accessibility icons.

Figure 10.5

1. **View Invitation Status:** Administrators can use the “View Invitation Status” to see what progress has been made on an invitation (figure 10.6).

ADMIN PROFILE CMS LOGOUT

Military OneSource
CASE MANAGEMENT SYSTEM

Create Invitation | View Invitation Status

View Invitation Status

Monitor the status of invitations that have been sent from this site

View Invitation Status

Invited By:

Invitee:

Invitation Sent on OR After:

Response Status:

Date Sent	Invited By	Invitee	Status		
2/15/2013 7:05:17 AM	Administrator Test	jbarker@bowenconsulting.com	Accepted	view	delete
8/15/2012 5:30:41 PM	Michela Baca	red_pedrick@nliven.com	Accepted	view	delete
2/15/2013 7:05:15 AM	Administrator Test	srose-johnson@bowenconsulting.com	Accepted	view	delete
2/15/2013 7:05:16 AM	Administrator Test	awitther@bowenconsulting.com	Accepted	view	delete
1/17/2013 5:29:58 AM	Brandi Jacobs	brandi.jacobs10@gmail.com	Accepted	view	delete
8/13/2012 5:32:08 PM	Michela Baca	travis.zander@defenseweb.com	Accepted	view	delete
2/7/2013 11:03:00 AM	Red Pedrick	michela.baca@acsstaff.org	Accepted	view	delete
8/28/2012 5:31:23 PM	Jim Bailey	gerry.hazeltan@nliven.com	Touched	view	delete
2/15/2013 7:05:16 AM	Administrator Test	mdamoah@bowenconsulting.com	Accepted	view	delete
8/29/2012 2:02:16 PM	brian jong	michael.malone@nliven.com	Accepted	view	delete
8/13/2012 5:40:47 PM	Michela Baca	brian.jong@defenseweb.com	Accepted	view	delete
8/16/2012 6:45:21 AM	Michela Baca	michela.baca@armyfrg.org	Accepted	view	delete
2/15/2013 7:05:16 AM	Administrator Test	flanier@bowenconsulting.com	Accepted	view	delete
1/17/2013 5:18:08 AM	Brandi Jacobs	brandi.jacobs10@gmail.com	Accepted	view	delete
8/29/2012 1:50:20 PM	Jim Bailey	david.refier@defenseweb.com	Accepted	view	delete
2/15/2013 7:05:15 AM	Administrator Test	sgarrett@bowenconsulting.com	Accepted	view	delete
2/19/2013 4:37:51 PM	Brandi Jacobs	bim1026@hotmail.com	Pending	view	delete resend
8/14/2012 8:43:05 AM	Michela Baca	gerry.hazeltan@defenseweb.com	Accepted	view	delete
1/17/2013 5:22:00 AM	Brandi Jacobs	brandi.jacobs10@gmail.com	Accepted	view	delete
11/28/2012 2:48:22 PM	brian jong	jong.brian@gmail.com	Touched	view	delete
1/14/2013 11:07:24 AM	Brandi Jacobs	brandi.jacobs10@gmail.com	Accepted	view	delete
1/17/2013 5:14:53 AM	Brandi Jacobs	brandi.jacobs10@gmail.com	Accepted	view	delete
8/13/2012 5:41:11 PM	Michela Baca	christopher.rudy@defenseweb.com	Accepted	view	delete
11/21/2012 11:33:14 AM	Geoff Williams	geoff.williams@defenseweb.com	Accepted	view	delete
11/14/2012 12:36:54 PM	Michela Baca	geoff.williams@nliven.com	Accepted	view	delete
2/15/2013 7:05:15 AM	Administrator Test	mkazilbash@bowenconsulting.com	Accepted	view	delete
1/17/2013 5:27:38 AM	Brandi Jacobs	brandi.jacobs10@gmail.com	Accepted	view	delete
2/15/2013 7:05:02 AM	Administrator Test	MBaker@bowenconsulting.com	Accepted	view	delete
2/19/2013 6:19:42 PM	brian jong	randy.scott@defenseweb.com	Pending	view	delete resend
1/17/2013 5:25:27 AM	Brandi Jacobs	brandi.jacobs10@gmail.com	Accepted	view	delete
8/16/2012 8:36:57 AM	Michela Baca	michela.baca@armyfrg.org	Accepted	view	delete

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USA.gov

Figure 10.6

- View Invitation:** Administrators can use the “View” link next to an invitation to view the invitation details.

ADMIN PROFILE CMS LOGOUT

Military OneSource
CASE MANAGEMENT SYSTEM

Create Invitation | View Invitation Status

View Invitation

View the detailed information for the selected invitation

Invitation Details

Invitation Details
 Invited By: Brandi Jacobs
 Invitation Created: 1/17/2013
 Invitation Sent To: brandi.jacobs10@gmail.com
 Access Levels Granted: Special Consultant Supervisor Registered User

Figure 10.7

3. Invitation Manager Templates: Administrators can use the Invitation Manager Templates to create a new invitation.

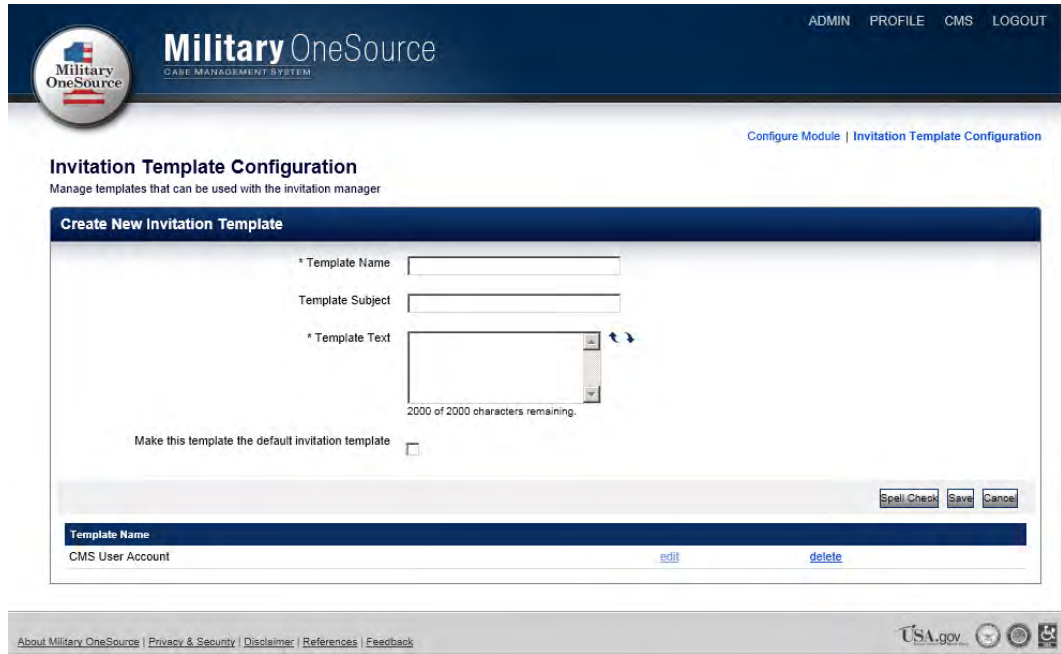


Figure 10.8

4. Edit Invitation Template: Administrators can use the “Edit” link next to a template to make any changes.

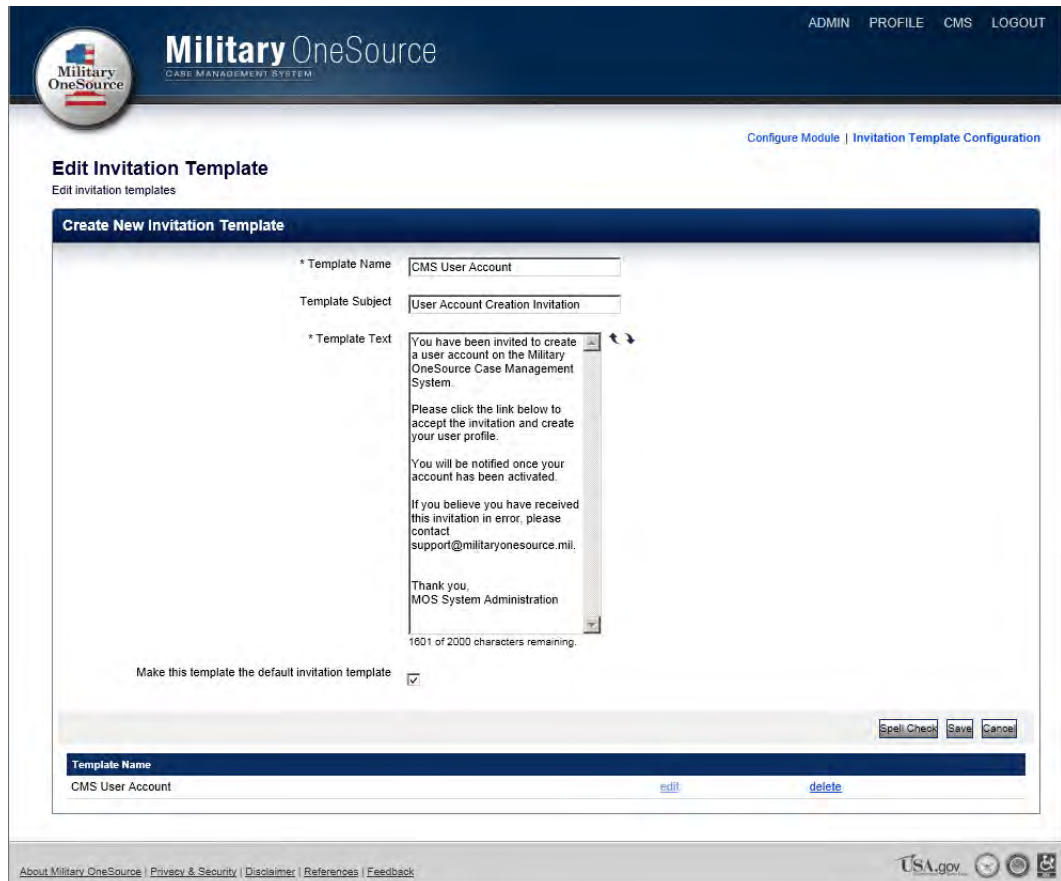


Figure 10.9

- iii. **Download Center:** Users can access different resources in the Download center, including user manuals and computer based trainings.

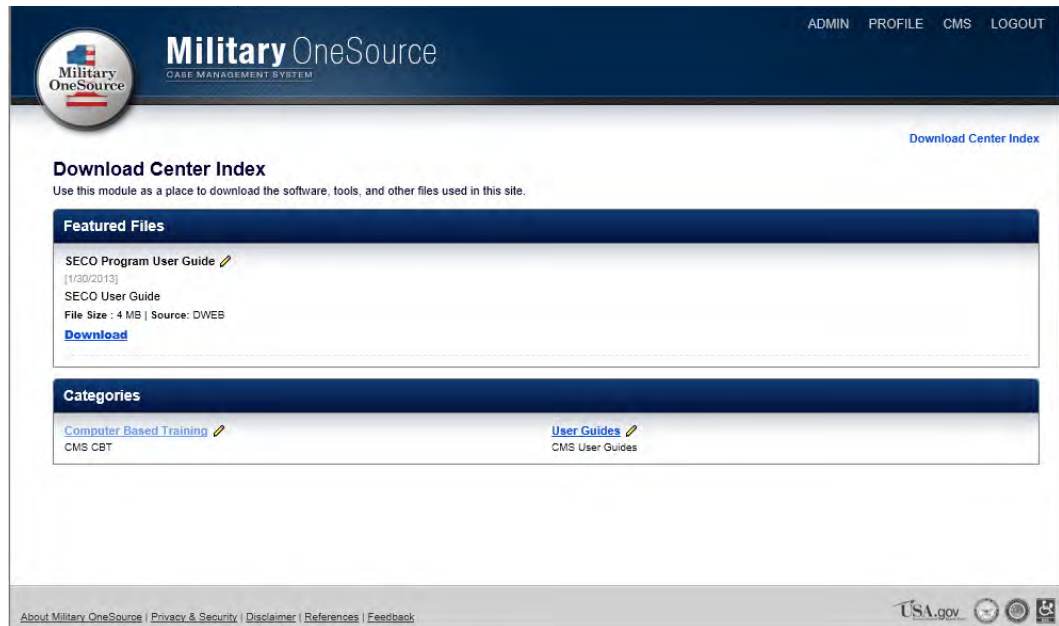


Figure 10.10

- 1. **User Guides:** Users can access the different user guides available for the Military Source CMS.



Figure 10.11

- 2. **Computer Based Trainings:** Users can access the different computer based trainings available for the Military OneSource CMS.



Figure 10.12

- iv. **Feedback:** A feedback system is available on the Military OneSource site where users on the site can submit trouble tickets and administrators can go in and assist.

The screenshot displays the Military OneSource Feedback interface. At the top, there is a navigation bar with the Military OneSource logo and the text 'CARE MANAGEMENT SYSTEM'. The main header includes 'Military OneSource' and 'CARE MANAGEMENT SYSTEM'. The left sidebar contains a 'Download Center' and a 'Feedback' section with sub-links for 'Invitation Manager', 'Page Tools', and 'User'. The main content area features a 'Feedback' section with a 'Filtering Options' bar. This bar includes dropdown menus for 'Time Frame', 'Status', and 'Contact Type', and a text input for 'Submitter Name'. Below the filters are buttons for 'Update List', 'Clear Filters', and 'Export Feedback'. A summary bar shows 'Total Open: 2' and 'Total Resolved: 0'. The main table lists feedback items with columns for Name, Subject, Recipient, Date Submitted, Contact Type, Contacted, and Status. Two items are visible: 'Test feedback' by Michela Baca and 'Anyone there' by admin admin.

Name	Subject	Recipient	Date Submitted	Contact Type	Contacted	Status
Michela Baca	Test feedback	N/A	6/1/2012	Email	No	Open View
admin admin	Anyone there	N/A	6/1/2012	Email	No (N/A)	Open View

Figure 10.13

1. **View Suggestion:** Administrators can view any incoming trouble tickets/suggestions/comments by clicking on the “View” link next to the feedback item (Figure 10.14).

ADMIN PROFILE CMS LOGOUT

Military OneSource
CARE MANAGEMENT SYSTEM

[Manage Suggestions](#) | [Counters](#) | [Reports](#) | [Recipients](#) | [Feedback Configuration](#) | [Configure Module](#)
[View Suggestions](#) | [Add Suggestion](#) | [Common Responses](#)

Download Center

Feedback

Invitation Manager

Page Tools

User

View Suggestion

Use this page to view and/or comment on the suggestion in question.

Feedback Information

Author: Michela Baca (michela.baca@defense.eb.com)

Recipient: Please Select

Legacy Recipients: No Recipients

Contact Me?: Yes

Has the user been contacted?: Yes No

Feedback Category: Question

Status: Open

Point of Origination: <http://mcfpcms.demo.defense.eb.com/skins/moscms/home.aspx?mode=user>

Email a Response

Email a Response?

Add Salutation:

Email "From" Address:

Add Common Response Header: Please Select

Custom Response Text:

Add Common Response Footer: Please Select

Add Attachment to Response:

Response History

Subject:	Test feedback
Feedback:	Testing feedback
Date Submitted:	6/1/2012 4:25 PM

Figure 10.14

2. **Add Suggestion:** Users can add feedback items on behalf of users by clicking on the "Add Suggestion" link in the feedback management links (Figure 10.15).

Military OneSource
CASE MANAGEMENT SYSTEM

ADMIN PROFILE CMS LOGOUT

Manage Suggestions | Counters | Reports | Recipients | Feedback Configuration | Configure Module
View Suggestions | Add Suggestion | Common Responses

Download Center
Feedback
Invitation Manager
Page Tools
User

Add Suggestion

Enter a new Suggestion into the system on behalf of a user.

Your Information

Contact Type: Phone

Date Received: 3/20/2013 [Calendar]

* Subject: [Text Field]

* Suggestion: [Text Area]

* Name: [Text Field]

Contact Me: Yes No

* Email: [Text Field]

Suggestion Type: Please Select

[Spell Check] [Next] [Cancel]

Figure 10.15

- 3. Add Common Responses:** Administrators can create common responses to make the feedback process more efficient.

Military OneSource
CASE MANAGEMENT SYSTEM

ADMIN PROFILE CMS LOGOUT

Manage Suggestions | Counters | Reports | Recipients | Feedback Configuration | Configure Module
View Suggestions | Add Suggestion | Common Responses

Download Center
Feedback
Invitation Manager
Page Tools
User

Common Responses

Manage stock feedback responses.

Response Name	Response Text	
Brandi's signature	Brandi Jacobs (858) 882-5809	Edit

Common Response Details

* Response Name: [Text Field]

* Response Text: [Text Area]

[Spell Check] [Add New Response]

Figure 10.16

- 4. Edit Common Responses:** Administrators can edit existing common responses (Figure 10.17).

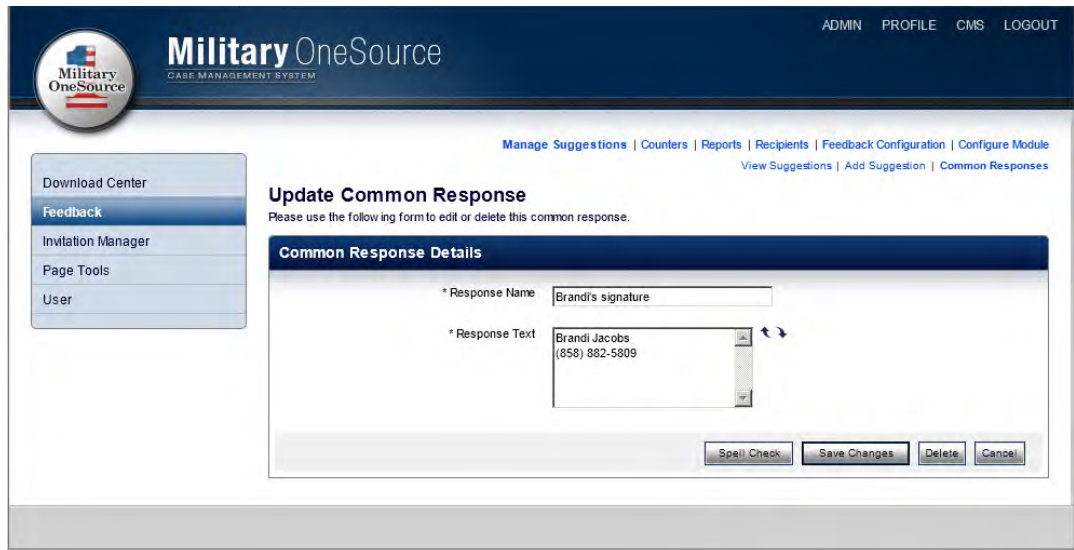


Figure 10.17

- 5. Feedback Counters:** Administrators can use the Counters link to track any telephone calls or direct emails related to feedback items.

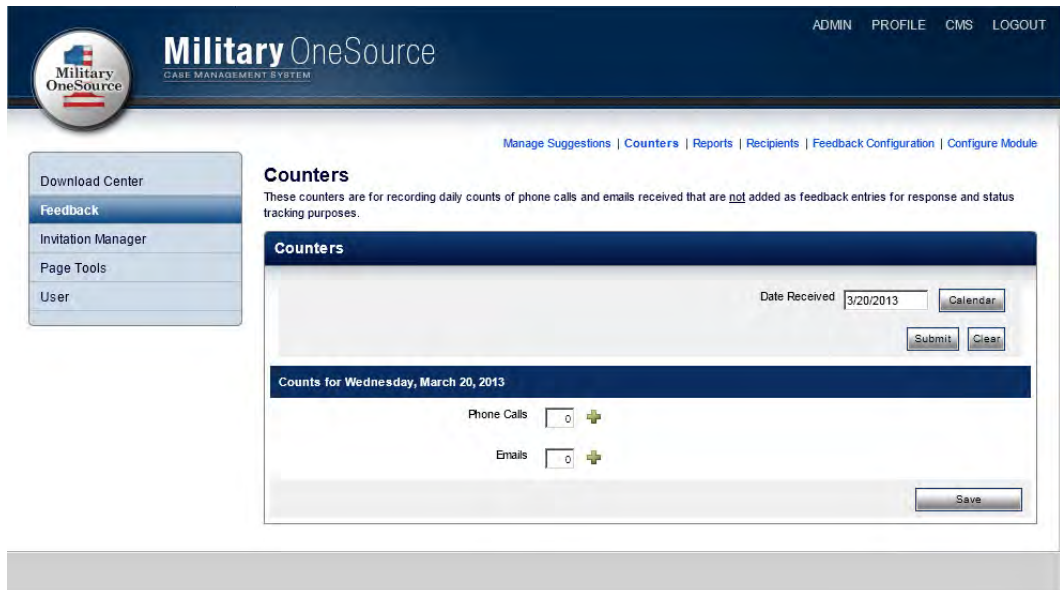


Figure 10.18

- 6. Feedback Reports:** Administrators can generate reports to collect data on feedback items (Figure 10.19).

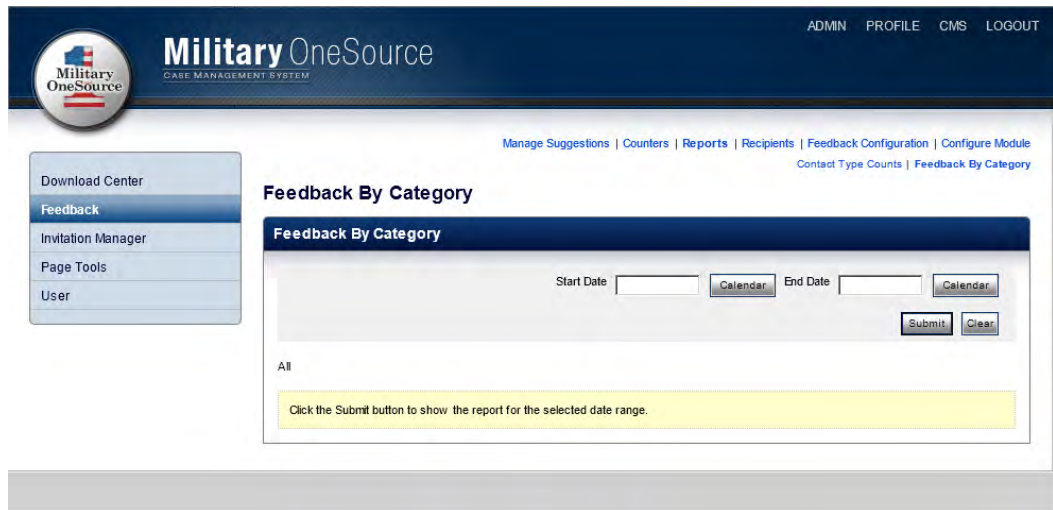


Figure 10.19

- 7. Feedback Recipients:** Administrators can view who receives the incoming feedback items via email.

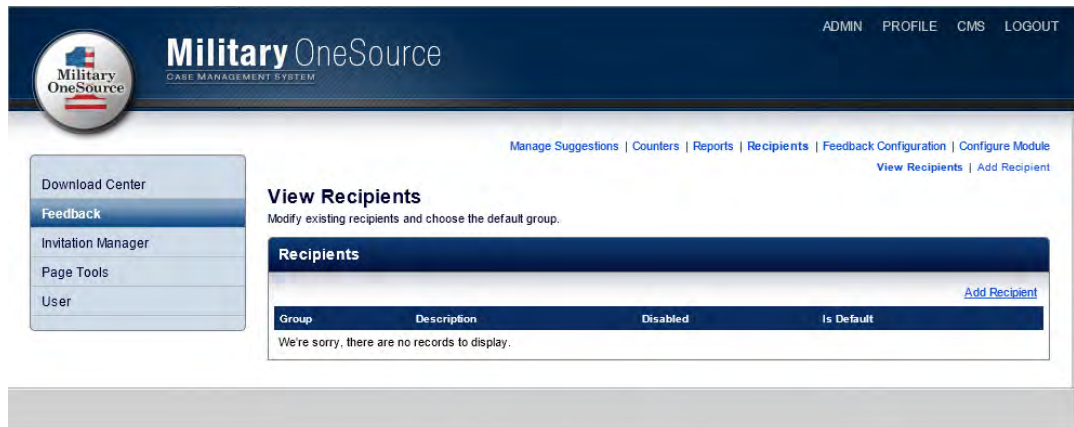


Figure 10.20

- 8. Add Feedback Recipient:** Administrators can edit who receives the incoming feedback items via email (Figure 10.21).



- Download Center
- Feedback**
- Invitation Manager
- Page Tools
- User

Add Recipient

Please use the following form to add a recipient. A recipient group consists of those individuals you have selected to receive suggestions from your users. You may have a single recipient group to handle all suggestions, or multiple groups to handle comments on specific topics. Click "Add Recipient" when finished.

Recipient Information

* Name

Description

Is Default Yes No

Responses to full "To" group Never Always Only Upon Status Set To "Resolved"

Responses to full "Cc" group Never Always Only Upon Status Set To "Resolved"

Responses to full "Bcc" group Never Always Only Upon Status Set To "Resolved"

"To:" Recipients

"Cc:" Recipients

"Bcc:" Recipients

To: Users You can specify recipients by user account after pressing the Add Recipient button.

Figure 10.21

III. MFLC Locator

a. Search: The Search page without any results generated.

The screenshot shows the MFLC Locator search interface. At the top, there is a navigation bar with the Military OneSource logo and the text "MFLC Locator". Below this, the word "Search" is displayed. The search form includes fields for "Location Name", "Contact Phone", "Location State" (a dropdown menu), and "Location Country" (a dropdown menu). There is also an "Installation" dropdown menu. A "Search" button and a "Clear" button are located to the right of the form. Below the form is a table with the following headers: "Location", "Address", "Postal Code", "Phone", "Categories", and "Installation". The table is currently empty. At the bottom of the page, there is a footer with links for "About Military OneSource", "Privacy & Security", "Disclaimer", "References", and "Feedback", along with the USA.gov logo.

Figure 11.1

b. Search: The Search page with results generated.

The screenshot shows the MFLC Locator search interface with search results. The search form is filled with "ACS" in the "Location Name" field. The "Search" button is highlighted. Below the form, the table displays the following results:

Location	Address	Postal Code	Phone	Categories	Installation
ACS Center Updated	330 Hail Street, Johnstown	15906	555-888-1001	MFLC	Fort Carson
ACS	123 ABC Road, Alexandria	22311	125-545-0001	Child and Youth Behavioral MFLC (0-8) / Installation: OFF Child and Youth Behavioral MFLC (13-18) / Installation: ON	
ACS Center	1717 C Street, Anchorage	99501	555-895-9565	MFLC	
ACS Center	1717 C Street, Anchorage	99501	555-895-9565	MFLC JFSAP MFLC	
ACS Center	1717 C Street, Anchorage	99501	555-895-9566	MFLC	
MFLC #1 (ACS BLD 561)	Avenue G and 3rd Street, Fort Irwin	92310	760-550-4451	MFLC	Fort Irwin
ACS	Center Road, Stafford	00000	787-878-7878	MFLC	

At the bottom of the table, there is a "Map data (c) OpenStreetMap contributors, CC-BY-SA" link and an "Add New" button. The footer of the page is the same as in Figure 11.1.

Figure 11.2

- c. **Edit Location:** Administrators can click on the Location to edit it.

The screenshot displays the MFLC Locator web application interface. At the top left is the Military OneSource logo. The header includes navigation links: SEARCH, SETTINGS, PROFILE, ADMIN, and LOGOUT. Below the header is a 'Search' section with a form containing the following fields: 'Location Name' (text input), 'Contact Phone' (text input), 'Location State' (dropdown menu with 'Select State' selected), 'Location Country' (dropdown menu with 'Select Country' selected), and 'Installation' (dropdown menu with '-Select One-' selected). To the right of these fields are 'Search' and 'Clear' buttons. Below the search form is a table with the following headers: 'Location', 'Address', 'Postal Code', 'Phone', 'Categories', and 'Installation'. The table body is currently empty. At the bottom of the page, there is a footer with links: 'About Military OneSource | Privacy & Security | Disclaimer | References | Feedback' and the USA.gov logo.

Figure 11.3

- d. **Add New Location** Users must first generate a search to ensure that the location does not already exist, but once a search is generated, the administrator can click on the “Add New” button to add a new single location (Figure 11.4).

SEARCH SETTINGS PROFILE ADMIN LOGOUT

MFLC Locator

Edit Location

Location Name

Address

City State Postal Code Country

Installation

Primary Contact Active

Phone

Categories	Primary
<input type="checkbox"/> MFLC	<input type="radio"/>
<input type="checkbox"/> Child and Youth Behavioral MFLC (0-6) / Installation: ON	<input type="radio"/>
<input type="checkbox"/> Child and Youth Behavioral MFLC (0-6) / Installation: OFF	<input type="radio"/>
<input type="checkbox"/> Child and Youth Behavioral MFLC (6-12) / Installation: ON	<input type="radio"/>
<input type="checkbox"/> Child and Youth Behavioral MFLC (6-12) / Installation: OFF	<input type="radio"/>
<input type="checkbox"/> Child and Youth Behavioral MFLC (13-18) / Installation: ON	<input type="radio"/>
<input type="checkbox"/> Child and Youth Behavioral MFLC (13-18) / Installation: OFF	<input type="radio"/>
<input type="checkbox"/> Personal Financial Counselor	<input type="radio"/>
<input type="checkbox"/> JFSAP MFLC	<input type="radio"/>
<input type="checkbox"/> JFSAP Child and Youth Behavioral MFLC	<input type="radio"/>
<input type="checkbox"/> JFSAP Personal Financial Counselor	<input type="radio"/>
<input type="checkbox"/> Unassigned	<input type="radio"/>

[Add Secondary Contact](#)

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Figure 11.4

- e. **Settings:** Administrators can go to the “Settings” page to change the default radius, export MFLC Locator data, upload files, and locate the location template (Figure 11.5).

Settings and Configuration

Set default radius for MFLC location proximity search

Set default mile radius to:

Import / Export MFLC data

Upload Import File

Please select a file to import below.

File Uploads

File name	# Rows processed	Status	Upload date	Uploaded by
mflc-location-upload-uat.xlsx	48	Complete	2/7/2013 1:23:25 PM	Michael Malone
mflc-location-upload.xlsx	49	Complete	1/17/2013 10:37:54 AM	brian jong
mflc-location-upload-uat.xlsx	48	Complete	12/5/2012 11:45:58 AM	Michael Malone
mflc-location-upload.xlsx	46	Complete	11/21/2012 11:19:49 AM	Michael Malone
mflc-location-upload.xml	0	Failed	8/30/2012 10:50:13 AM	Michael Malone
mflc-location-upload-uat.xml	46	Complete	8/29/2012 6:15:14 PM	Michael Malone
mflc-location-upload 1.xml	40	Complete	8/29/2012 2:29:15 PM	Brandi Jacobs
mflc-location-upload 1.xml	39	Complete	8/29/2012 2:27:16 PM	Brandi Jacobs
mflc-location-upload 1.xml	0	Failed	8/29/2012 2:22:02 PM	Brandi Jacobs
mflc-location-upload 1.xml	0	Failed	8/29/2012 2:17:50 PM	Brandi Jacobs
mflc-location-upload (1).xml	13	Complete	8/23/2012 3:01:16 PM	Kim Mathieu


Figure 11.5

- i. **Export MFLC Locator Data:** Administrators can export MFLC Locator data which is an Excel file of the locations in the system.

Location Name	Address 1	Address 2	City	State	Postal Code	Country	Installation Name	Primary Contact Number	Secord
new niven	10188 Telesis Court	Suite 390	San Diego	CA	92121	USA	Fort Riley	842-143-2222	
USD	5980 Alcalá Park		San Diego	CA	92110	USA	Fort Carson	855-824-0888	435-4
Michigan	2123 Tortuga Street		Relava	FL	32432	United States	Camp Parks	567-567-5678	567-5
Wynn Updated	3131 Las Vegas Blvd S		Las Vegas	NV	89109	United States	U.S. Army Garrison - Brussels	543-254-3254	423-5
ACS Center Updated	330 Hall Street		Johannesburg	PA	15806	United States	Fort Carson	555-888-1081	
ACS	175 48C Road		Alexandria	VA	22311	United States		125-545-0001	
Redstone MWR	1150 Weeden Mountain Road		Madison	AL	35898	United States	Redstone Arsenal	415-465-0545	
ACS Office	3845 Tammack		Little Rock	AK	72204	United States	Fort Irwin	889-978-9874	
Test location	214E, Loyalhanna St.		Ligonier	PA	15658	United States		724-288-8888	
ACS Center	1717 C Street		Anchorage	AK	99501	United States		555-895-9565	
Texas	2100 San Jacinto Boulevard		Austin	TX	78712	United States	Fort Rucker	123-451-3242	234-5
Location Name	272 Main St.		Lutrocks	PA	15687	United States		284-123-2345	565-4
Financial Assistance	350 Hall Street		Johannesburg	PA	15806	United States		814-555-5555	
Wynn 2	3131 Las Vegas Blvd S		Las Vegas	NV	89109	United States	U.S. Army Garrison - Brussels	543-254-3254	423-5
Wynn 3	3131 Las Vegas Blvd S		Las Vegas	NV	89109	United States	U.S. Army Garrison - Brussels	543-254-3254	123-1
Imported loc	10535 Heater Court		San Diego	CA	92121	United States	Fort Irwin	123-234-3456	234-5
Imported loc 2	10535 Heater Court Two		San Diego	CA	92121	United States	Fort Irwin	123-234-3454	234-3
The Alamo	300 Alamo Plaza		San Antonio	TX	78205	country		431-443-2432	123-4
Nova Test	1009 Elliott Avenue	UNIT C	Charlottesville	VA	22901	United States	Fort Rucker	540-555-1000	540-5
Nova Location 2	1008 Elliott Avenue, Unit C		Charlottesville	AK	512541	United States	Fort Irwin	100-000-0001	
	21 Plum Court		Fredricksburg	VA	27486	United States		555-100-1000	
	21 Plum Court		Fredricksburg	VA	27486	United States		555-100-1000	
DWEB Office and Personnel	10188 Telesis Court		San Diego	CA	92121	United States		842-143-0001	
Nova Test	1008 Elliott Avenue		Charlottesville	VA	22902	United States		540-555-1000	
Redstone MWR	1150 Weeden Mountain Road		Madison	AL	35898	United States		415-465-4500	
ACS Center	1717 C Street		Anchorage	AK	99501	United States		555-895-9565	
ACS Center	1717 C Street		Anchorage	AK	99501	United States		555-895-9566	
Texas Center 1	7301 Sw Military Dr		San Antonio	TX	78224	United States		100-100-1000	100-11
Texas Center 2	7301 Sw Military Dr		San Antonio	TX	78224	United States		100-100-1002	
	2400 Sw Military Dr		San Antonio	TX	78224	United States		100-100-1003	
Texas Center 5	2500 Sw Military Dr		San Antonio	TX	78224	USA		100-100-1007	
Texas Center 6	2600 Sw Military Dr		San Antonio	TX	78224	USA		100-100-1006	
Texas Center 7	2700 Sw Military Dr		San Antonio	TX	78224	abc		100-100-1007	
Texas Center 8 B	2700 Sw Military Dr		San Antonio	TX	78224	Albania		100-100-1008	
Texas Center 10	2810 Sw Military Dr		San Antonio	Somewhere	78224	United States		100-100-1010	

Figure 11.6

MFLC SEARCH PROFILE INVITATION MANAGER ADMIN LOGOUT



MFLC Locator

[Create Invitation](#) | [View Invitation Status](#)

Invitation Manager

Create new invitation to a specific invitee.

* Invitee's Email List

5000 of 5000 characters remaining.

* Invitation Subject

* Invitation Email Body

You have been invited to create a user account on the Military OneSource MFLC Locator. Please click the link below to accept the invitation and create your user profile. You will be notified once your account has been activated.

If you believe you have received this invitation in error, please contact support@militaryonesource.mil.

Thank you.
MOS System Administration

1819 of 2000 characters remaining.

* Access Levels Granted to the invitee

MFLC Locator Admin

Registered User

[About Military OneSource](#) | [Privacy & Security](#) | [Disclaimer](#) | [References](#) | [Feedback](#)




Figure 11.9

i. View Invitation Status

MFLC SEARCH PROFILE INVITATION MANAGER ADMIN LOGOUT

MFLC Locator

Military OneSource

Create Invitation | View Invitation Status

View Invitation Status

Monitor the status of invitations that have been sent from this site

View Invitation Status

Invited By:

Invitee:

Invitation Sent on OR After: [Calendar](#)

Response Status:

[Search](#) [Clear Filter](#)

Date Sent	Invited By	Invitee	Status			
8/15/2012 11:19:07 AM	Michael Malone	tom.greene@defenseweb.com	Accepted	view	delete	
8/16/2012 9:00:07 AM	Michela Baca	karen.karadimov@osd.mil	Pending	view	delete	resend
8/10/2012 3:05:14 PM	Seth Darr	cramdoninash@gmail.com	Accepted	view	delete	
8/16/2012 8:58:24 AM	Michela Baca	Kelly.Mohondro@osd.mil	Accepted	view	delete	
2/15/2013 9:38:10 AM	Brandi Jacobs	jbarker@bowenconsulting.com	Accepted	view	delete	
2/15/2013 9:38:08 AM	Brandi Jacobs	srose-johnson@bowenconsulting.com	Accepted	view	delete	
1/17/2013 6:58:13 AM	Brandi Jacobs	brandi.jacobs10@gmail.com	Accepted	view	delete	
8/27/2012 7:19:52 AM	Kim Mathieu	kimberly.lockett@nliven.com	Accepted	view	delete	
3/21/2013 4:31:24 PM	Michela Baca	travis.zander@defenseweb.com	Accepted	view	delete	
9/26/2012 4:41:10 PM	Michela Baca	michela.baca@acsstaff.org	Accepted	view	delete	
2/15/2013 9:38:09 AM	Brandi Jacobs	mdamoah@bowenconsulting.com	Accepted	view	delete	
2/15/2013 9:38:09 AM	Brandi Jacobs	mkazilbash@bowenconsulting.com	Accepted	view	delete	
2/15/2013 9:38:09 AM	Brandi Jacobs	flanier@bowenconsulting.com	Accepted	view	delete	
8/8/2012 6:24:06 PM	Seth Darr	seth.darr@defenseweb.com	Touched	view	delete	
9/26/2012 4:39:58 PM	brian jong	brian.jong@nliven.com	Accepted	view	delete	
2/15/2013 9:37:56 AM	Brandi Jacobs	MBaker@bowenconsulting.com	Accepted	view	delete	
8/27/2012 11:24:53 AM	Kim Mathieu	kimberly.lockett@defenseweb.com	Accepted	view	delete	
2/15/2013 9:38:10 AM	Brandi Jacobs	awitcher@bowenconsulting.com	Accepted	view	delete	
8/10/2012 3:02:08 PM	Seth Darr	sethdarr@gmail.com	Touched	view	delete	
2/15/2013 9:38:08 AM	Brandi Jacobs	sgarrett@bowenconsulting.com	Accepted	view	delete	
8/27/2012 11:09:01 AM	Kim Mathieu	kimberly.mathieu@nliven.com	Accepted	view	delete	
8/16/2012 9:00:08 AM	Michela Baca	richard.briggs@osd.mil	Accepted	view	delete	
8/15/2012 9:25:16 AM	Seth Darr	dave.yates@nliven.com	Accepted	view	delete	
8/16/2012 8:58:25 AM	Michela Baca	David.Dupuis@osd.mil	Accepted	view	delete	
8/27/2012 11:41:47 AM	Kim Mathieu	kimberly.lockett@sd.defenseweb.net	Pending	view	delete	resend

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Figure 11.10

ii. View Invitation

MFLC SEARCH PROFILE INVITATION MANAGER ADMIN LOGOUT

MFLC Locator

Military OneSource

Create Invitation | View Invitation Status

View Invitation

View the detailed information for the selected invitation

Invitation Details

Invitation Details
 Invited By: Michael Malone
 Invitation Created: 8/15/2012
 Invitation Sent To: tom.greene@defenseweb.com
 Access Levels Granted: Registered User Administrator MFLC Locator Admin

[Back](#)

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Figure 11.11

iii. Invitation Template

The screenshot shows the 'Create New Invitation Template' page in the MFLC Locator system. The page header includes the Military OneSource logo and navigation links for MFLC SEARCH, PROFILE, INVITATION MANAGER, ADMIN, and LOGOUT. The breadcrumb trail is 'Configure Module | Invitation Manager Configuration | Invitation Template Configuration'. The main heading is 'Invitation Template Configuration' with the subtext 'Manage templates that can be used with the invitation manager'. The form contains the following fields: 'Template Name' (empty), 'Template Subject' (empty), and 'Template Text' (empty). A character count indicates '2000 of 2000 characters remaining'. There is a checkbox for 'Make this template the default invitation template' which is unchecked. At the bottom right are 'Spell Check', 'Save', and 'Cancel' buttons. Below the form is a table with one row: 'MFLC Admin Account' with 'edit' and 'delete' links.

Figure 11.12

iv. Edit Template

The screenshot shows the 'Edit Invitation Template' page in the MFLC Locator system. The page header is identical to Figure 11.12. The breadcrumb trail is 'Configure Module | Invitation Manager Configuration | Invitation Template Configuration'. The main heading is 'Edit Invitation Template' with the subtext 'Edit invitation templates'. The form contains the following fields: 'Template Name' (filled with 'MFLC Admin Account'), 'Template Subject' (filled with 'User Account Creation Invitation'), and 'Template Text' (filled with a multi-paragraph invitation message). A character count indicates '1619 of 2000 characters remaining'. There is a checkbox for 'Make this template the default invitation template' which is checked. At the bottom right are 'Spell Check', 'Save', and 'Cancel' buttons. Below the form is a table with one row: 'MFLC Admin Account' with 'edit' and 'delete' links.

Figure 11.13

IV. Miscellaneous

- a. **About Military OneSource:** Users can click on the About Military OneSource link at the bottom of every page to learn about Military OneSource.

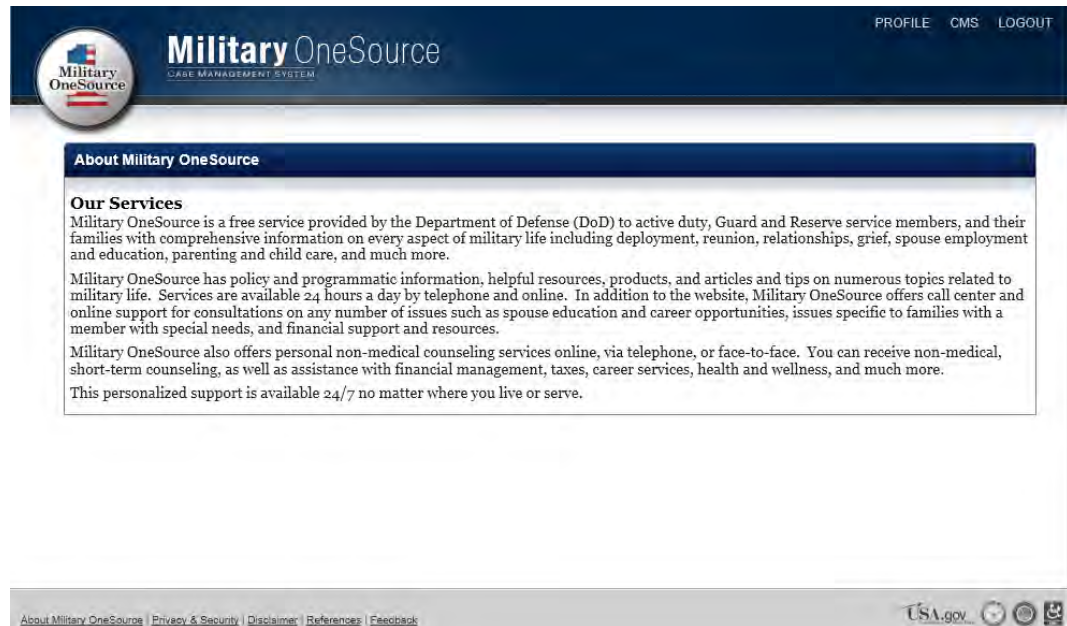


Figure 12.1

- b. **Privacy & Security :** Users can click on the Privacy & Security link at the bottom of every page to learn more about Privacy Policy and Security.



Figure 12.2

- c. **Disclaimer:** Users can click on the Disclaimer link at the bottom of every page to learn more about the site's Disclaimer (Figure 12.3).



Disclaimer

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Military OneSource Case Management System (CMS) does not share personally identifiable information with vendors or other agents, companies, or services without your expressed permission. Your personal information is used only to enhance your experience with Military OneSource CMS; it is not sold, rented, loaned, or transferred to any unrelated third parties. Although aggregated statistics about site usage are prepared to better serve our customer base, no identifiable information is tracked in these statistical reports. However, Military OneSource is obligated to provide certain reportable information to the appropriate military authority for discussions concerning your safety or the safety of others. Military OneSource is also mandated to notify the proper State agencies in these instances.

You should be aware that if you use employer-provided equipment, email services, or use employer access to the Internet, monitoring software may be used at any time and no rights to privacy will be afforded. Employers may use monitoring software from time to time to log all accesses to the Internet and report such activity to management. Employers may also monitor all email messages by you, or others using employer equipment or an employer network for access or transmission of data.

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If you are experiencing a crisis situation, such as a medical emergency, suicidal intent, a danger to yourself or others, are in an abusive relationship, or are concerned about child abuse or the abuse of an older relative or dependent adult, please contact the appropriate authorities promptly.

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The Military OneSource Discussion Board service is free to all eligible Military OneSource participants. This service allows participants to post questions or concerns to the entire Military OneSource community. If a participant reads your posting on the Military OneSource Discussion Board, he/she may post a response directly to it.

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If you are in an emergency medical situation, if you have suicidal intent, if you feel that you may be in an immediate danger to yourself or others, if you are in an abusive relationship, or if you are concerned about child abuse or the abuse of an older relative or dependent adult, you should promptly contact the appropriate authorities in that matter.

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All correspondence should be clear, concise, considerate, and meaningful. No participant has the right to infringe upon another participant's ability to obtain information on this site by methods such as, but not limited to, harassment, insults, or invasion of privacy. Messages posted or sent should not include any language, or visual or audio component that could be construed as unlawful, threatening, libelous, defamatory, obscene, fraudulent, harmful, abusive, hateful, pornographic, or in violation of any law or the Uniform Code of Military Justice (UCMJ), including the property rights of others or the privacy or publicity right of others.

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Military OneSource Online will not make available any identifiable information in any form without the prior written or electronic consent of the individual identified, with the following exceptions: providing information as required by law, court order, or other valid legal processes.

Figure 12.3

- d. **References:** Users can click on the “References” link to access the Download Center that contains the user manuals and the computer based trainings.

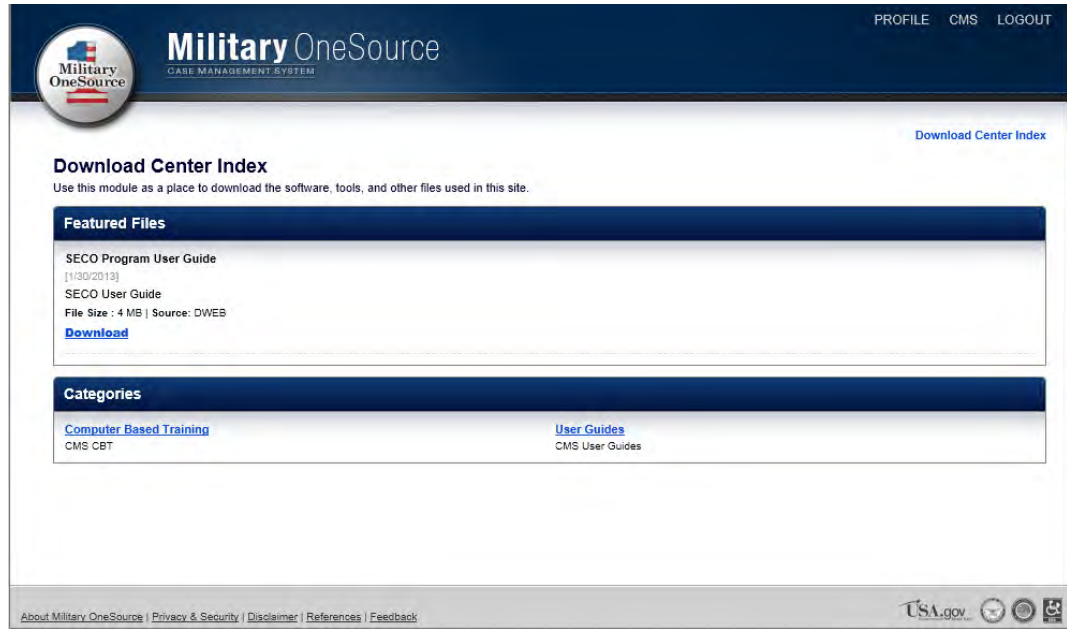


Figure 12.4

- e. **About MC&FP:** Users can click on the “About MC&FP” link to locate more information regarding MC&FP (Figure 12.5).



About Military Community & Family Policy

MC&FP Mission

The Office of the Deputy Assistant Secretary of Defense for MC&FP is directly responsible for programs and policies establishing and supporting community quality of life programs for service members and their families worldwide. This office also serves as the focal point for coordination of the broad range of QOL issues within the Department of Defense. Specifically, the Deputate performs the following functions:

- provides for family support policies and programs in areas including family center operations, child care, youth programs, family advocacy, relocation, transition support services, and support during mobilization and deployment (including casualty affairs)
- provides policy and management direction for dependents' education programs stateside and overseas to ensure educational services are uniform and high quality
- establishes program policy for mission sustaining and basic community programs for Morale, Welfare and Recreation, and Voluntary and Post-Secondary Education
- coordinates the services of nonprofit agencies such as the Red Cross, Armed Services YMCA and the USO
- provides policy and program oversight to ensure military community QOL programs are designed and executed to support the needs of the post-drawdown force and the DoD mission
- coordinates DoD oversight of the Armed Forces Retirement Home Board

Armed Forces Retirement Home

The AFRH is a one-of-a-kind independent federal agency established to care for veterans in three settings: independent living, assisted living, and long-term care. Services include physical activities, health care, arts and crafts, dining, travel, and social and cultural activities with [campuses](#) in Washington, DC and Gulfport, Mississippi.

Community Support for Families with Special Needs

The Office of Community Support for Families with Special Needs ensures that military families with special needs receive direct services (policy and oversight of early intervention services and special education provided to military children from the military medical departments and the DoD schools); assignment coordination (policy and oversight of the Exceptional Family Member Program enrollment and assignment coordination function); and family support (policy and oversight of the expansion of the EFMP family support function).

Defense Commissary Agency

DeCA, with headquarters at Fort Lee, Virginia, operates a world-wide system of commissary stores as an integral element of the military pay and benefits package for members of the uniformed services on active duty, members of the Reserve Components, retired members, and others authorized by law or regulation.

Department of Defense Education Activity

DoDEA plans, directs, coordinates, and manages the [education programs](#) for DoD dependents who would otherwise not have access to a high-quality public education.

Family Advocacy

FAP is the DoD social services program at every installation with command-sponsored families to address child abuse and domestic abuse in the military community, promoting public awareness and prevention, early identification, reporting, comprehensive and coordinated safety planning and support to victims, and treatment for all family members when appropriate, in collaboration with civilian agencies.

Family Policy/Children and Youth

The Office of Family Policy/Children and Youth provides oversight for child development programs; services and support for geographically dispersed service members and families in all states and territories; youth financial readiness services and tools that promote financial literacy and well-being; education programs that build skills for individual and family life development; and partnerships with federal and non-federal entities to augment support for service members and their families.

Military OneSource

Military OneSource provides service members and their families with access to a wide variety of resources and support in order to weather the demands of military life. In an increasingly technological and mobile world, [MilitaryOneSource.mil](#) offers support 24/7, telephonically as well as online.

Morale, Welfare and Recreation

MWR encompasses a wide array of community support and business operations, supporting authorized patrons worldwide. Participation in recreation, fitness, sports, cultural arts, and other leisure activities is the key to active living, which leads to improved personal health and well-being and helps build strong military families and healthy communities.

Resale Activities and Nonappropriated Fund Policy

The Resale Activities and Nonappropriated Fund Policy Office is responsible for the oversight and policy governing the commissary and exchange benefits, operations, and programs, which are among the most valued contributors to the quality of life of service members and their families.

Strategic Outreach

The Office of Military Community Outreach is responsible for developing and implementing outreach tactics supporting MC&FP, communicating critical program and policy information to service members and their families, leadership, and service providers through public affairs activities, online tools and resources, social media channels, and print products.

State Liaison and Educational Opportunities

Through engagement and education of state policymakers, nonprofit associations, concerned business interests, and other state leaders, DSLO seeks to work with states to remove unnecessary barriers and significantly improve the quality of life for military families. In addition, through program and policy oversight, the Educational Opportunities office supports the voluntary education requirements of one of the largest continuing education programs in the world.

Figure 12.5

- f. **Accessibility:** Users can click on the accessibility link to locate more information regarding Accessibility.

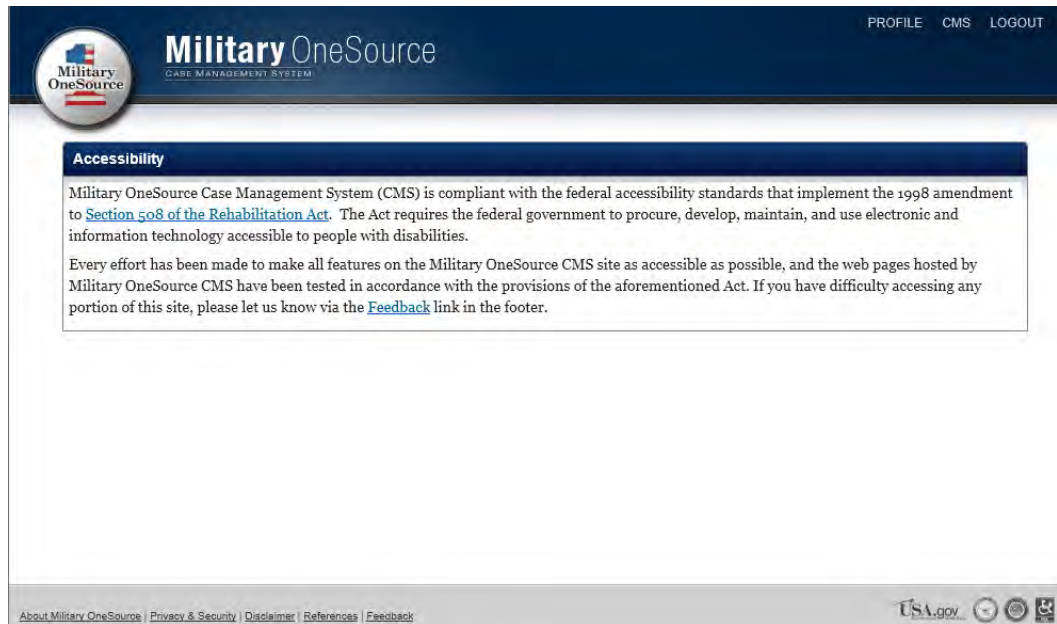


Figure 12.6