



Military OneSource

CASE MANAGEMENT SYSTEM

Call Center User Guide

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Login/Logout

- A Login/Logout link is available at the top of every page within the Military OneSource CMS site.
- Users log in using their username and password.
- If a user forgets his/her username and/or password, a “Forgot your password?” link is available on the Military OneSource CMS home page (Figure 1.1).
- Once this link is clicked, the user must enter the email address that is associated with his/her user account.
- An email is sent to the entered email address containing the username and a “Click Here” link that the user can utilize to change his/her password.
- If the user is unable to follow the “Click Here” link, the email also contains the web address that the user can copy and paste into his/her browser address bar to change his/her password.

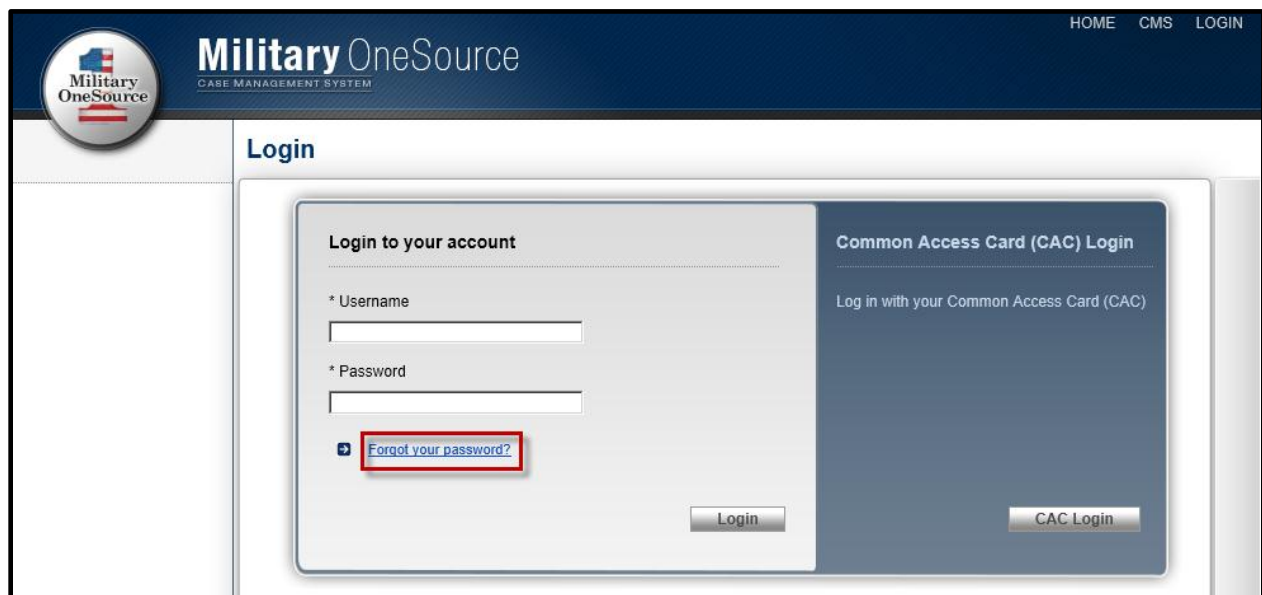


Figure 1.1

CAC/ECA Registration

- Users also have the option to register a CAC or ECA certificate. A username and password must first be established in order to associate the CAC or ECA.
- To associate a CAC/ECA to an account, click on the “CAC Login” button on the login page (Figure 2.1).

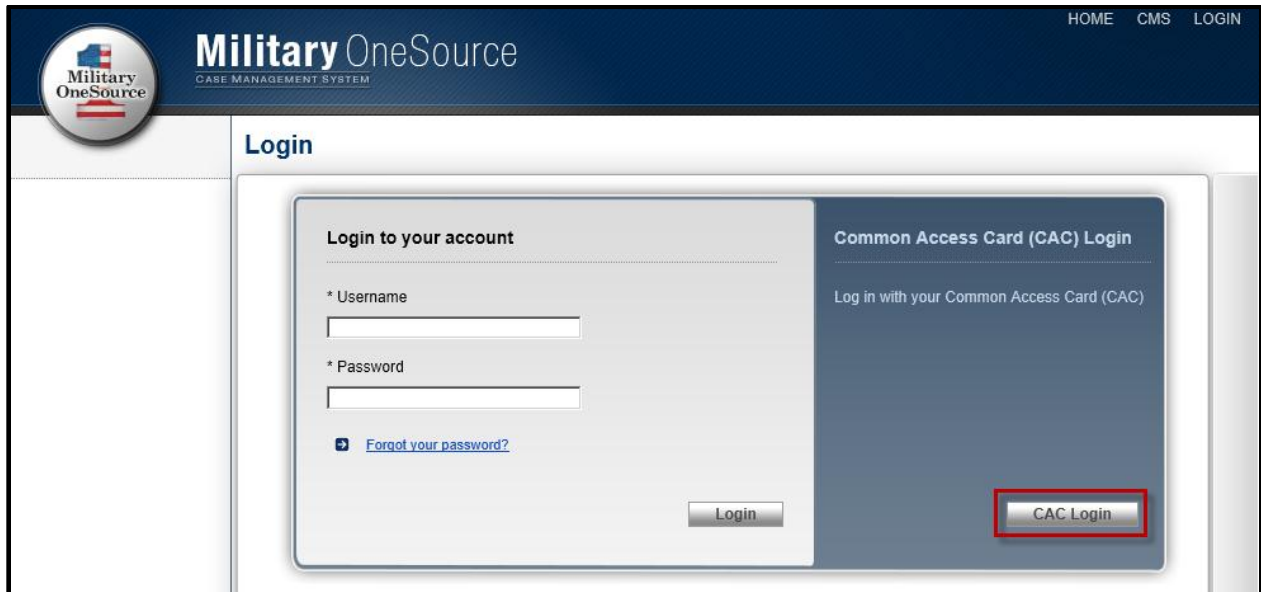


Figure 2.1

- Enter in your username and password and click on the “Register CAC Card” in order to associate your CAC/ECA to your account.
- If you forgot your username and password, you may register your CAC/ECA by entering your email and clicking on the “Send Email” button. An email will be sent to you that will contain a link that will allow you to easily register your CAC/ECA (Figure 2.2).

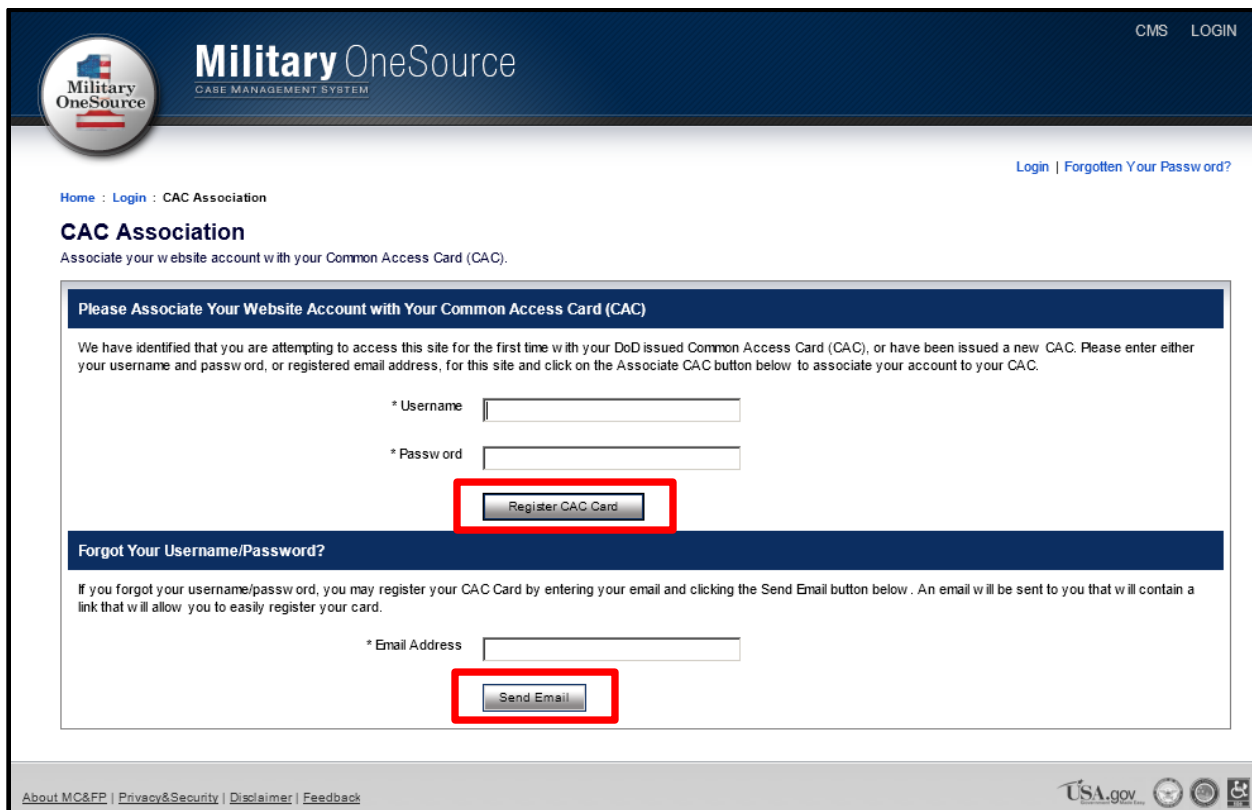


Figure 2.2

Updating Profile

- To update your profile, please click on the “Profile” link in the far upper right corner of any page (Figure 3.1).

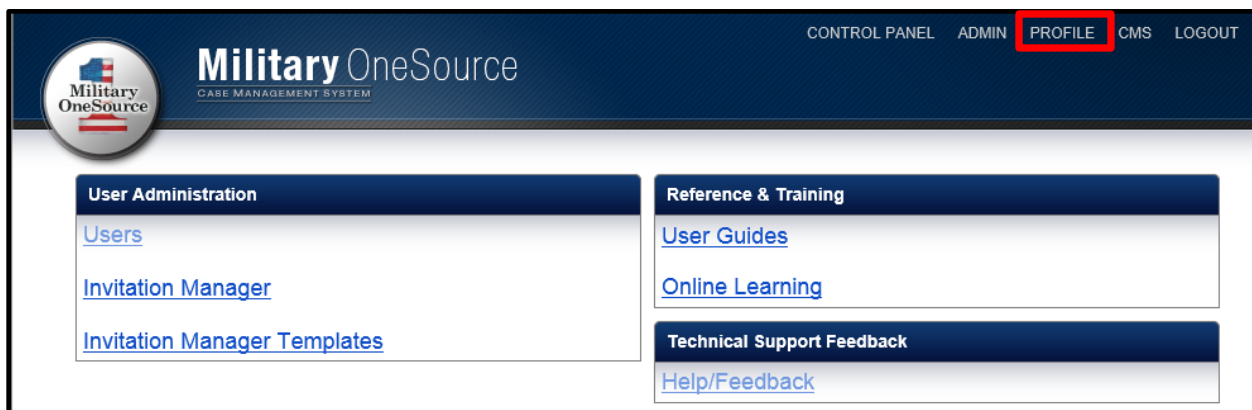


Figure 3.1

- Next, click on “Edit your Profile” (Figure 3.2).

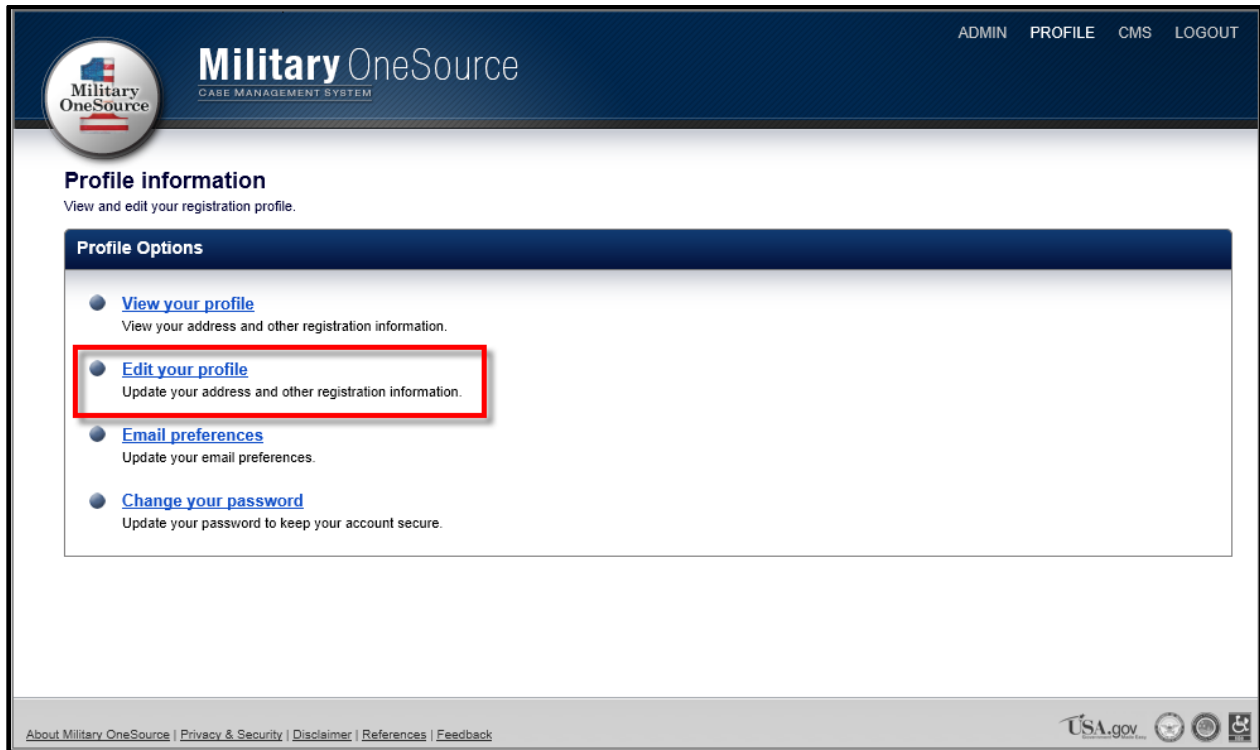


Figure 3.2

- Make the appropriate changes and select “Save.”

Incoming Calls

The steps for logging an incoming call will differ based upon the purpose of the call. Once you determine the caller’s purpose, refer to the applicable section in this document.

Purpose of call	Refer to
<ul style="list-style-type: none">• Quick information requests such as directions for local fast food, contact information for base resources, or caller dialed the wrong number	<ul style="list-style-type: none">• Quick Tracker
<ul style="list-style-type: none">• Emergency calls—crises, duty to warn, mandated reports, or adverse incidents	<ul style="list-style-type: none">• Crisis / Duty to Warn / Mandated Report
<ul style="list-style-type: none">• Requests for program assistance (SECO, Non-Medical Counseling, Specialty Consultation, Health & Wellness, Financial Counseling, Tax Services, and/or Recovering Warrior), OR a request for information that will require additional research or	<ul style="list-style-type: none">• Program Referrals

Purpose of call

time (such as assistance with child care or non-bulk fulfillment requests).

- Caller is following up regarding their pre-existing case

Refer to

- [Adding a Contact Note to a Case](#)

Quick Tracker

1. Go to the Search screen.

To access the Search screen click on SEARCH in the navigation bar at the top of the page from anywhere in the system.



Figure 4.1

2. Click on the Quick Tracker tab.

When clicked, the Quick Tracker drawer will slide out.

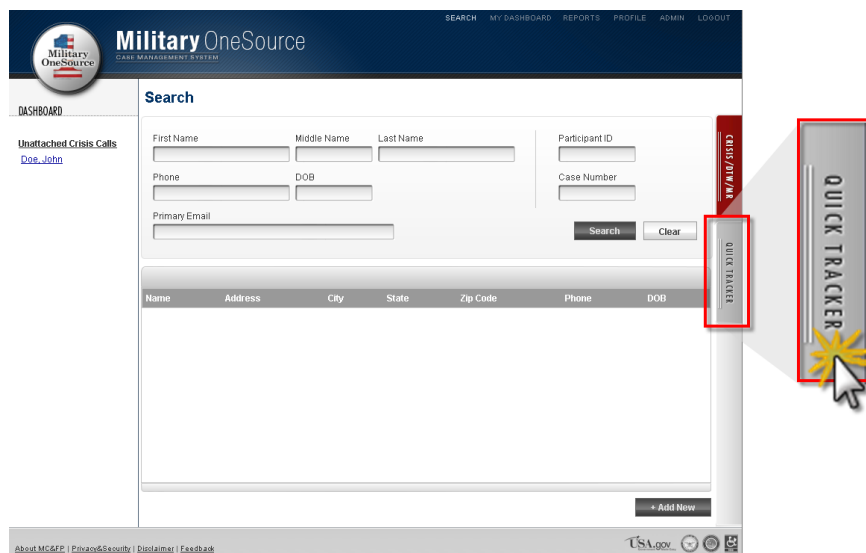


Figure 4.2

3. Select the applicable category/ies, and then click Done.

Your selected categories will be saved to the system and the drawer will close.

The counts for the selected Quick Tracker categories will be incremented by one (Figure 4.3).

No contact information is captured for Quick Tracker calls.

The Quick Tracker will reset the next time you open the drawer and all boxes display unchecked.

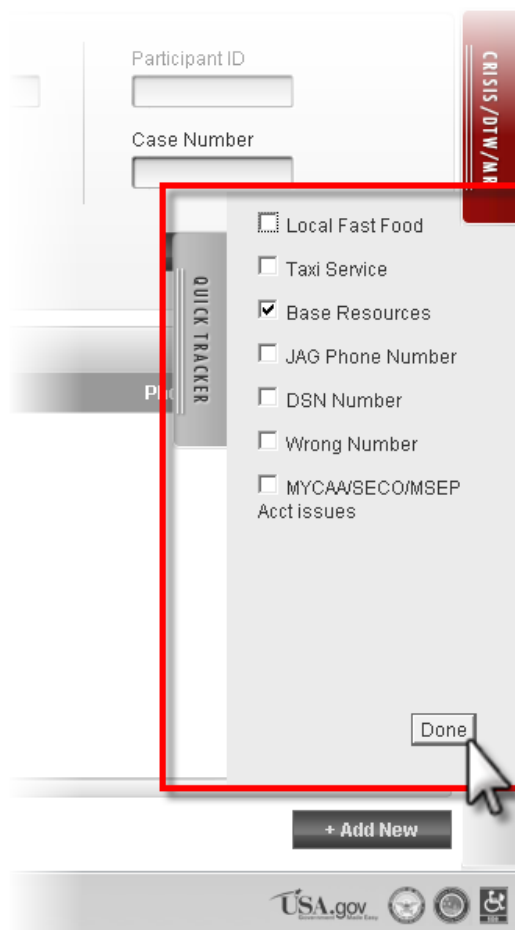


Figure 4.3

Working with Participant Records

The majority of activities you will be doing in the system will be interacting with the participants' records. This section will cover the most important actions with participant records:

- [Searching for a participant](#)
- [Viewing the participant's details and related cases](#)
- [Creating a new participant](#)
- [Editing a participant](#)

Search for a Participant

1. Go to the Search screen.

To access the Search screen click on **SEARCH** in the navigation bar at the top of the page from anywhere in the system.



Figure 5.1

2. Enter criteria and click Search.

You have the choice of searching for the participant by their personal information, OR you can search by entering their Participant ID or Case Number in the system (if known). You can locate a participant by entering just a portion of their name as opposed to entering their entire name (Figure 5.2).

At least one search field must be populated in order to execute the search.

A screenshot of the Military OneSource search interface. The top navigation bar includes 'SEARCH', 'MY DASHBOARD', 'REPORTS', 'PROFILE', and 'LOGOUT'. The main content area is titled 'Search' and contains several input fields: 'First Name' (with 'jo' entered), 'Middle Name', 'Last Name', 'Phone', 'DOB', and 'Primary Email'. To the right of these fields are two more input fields: 'Participant ID' and 'Case Number'. A red box highlights the 'First Name', 'Middle Name', and 'Last Name' fields. Another red box highlights the 'Participant ID' and 'Case Number' fields. Below the input fields are 'Search' and 'Clear' buttons. The search results are displayed in a table with the following data:

Name	Address	City	State	Postal Code	Phone	DOB
Jacobs, Josh					814-200-2000	5/16/1984
Navy, Joe L	555 West Highway	Norfolk	VA	12345	703-555-1212	9/12/1983
Army, Joe	777 Lipton st	Los Angeles	CA	93445	666-666-9999	9/2/1983
Doe, John	11222 Pintail Lane	Silverdale	WA	98383	360-555-1234	10/10/2012
McConnick, Joan	1234 Erehwon Rd.	Erehwon	VT	77777	555-555-5555	2/2/1983

Figure 5.2

3. Select the participant.

Open the participant's record by clicking on their name.

The screenshot shows the Military OneSource Case Management System interface. At the top, there is a navigation bar with 'SEARCH', 'MY DASHBOARD', 'REPORTS', 'PROFILE', and 'LOGOUT'. Below this is a 'Search' section with input fields for 'First Name', 'Middle Name', 'Last Name', 'Phone', 'DOB', 'Participant ID', and 'Case Number'. A 'Search' button is located to the right of these fields. Below the search fields, a table titled 'Participant search found 5 participants' displays the following data:

Name	Address	City	State	Postal Code	Phone	DOB
Jacobs, Josh					814-200-2000	5/16/1984
Navy, Joe L	555 West Highway	Norfolk	VA	12345	703-555-1212	9/12/1983
Army, Joe	777 Lipton st	Los Angeles	CA	93445	666-666-9999	9/2/1983
Doe, John	11222 Pintail Lane	Silverdale	WA	98383	360-555-1234	10/10/2012
McCormick, Joan	1234 Erewhon Rd.	Erewhon	VT	77777	555-555-5555	2/2/1983

The name 'McCormick, Joan' in the table is highlighted with a red box. The interface also includes a 'DASHBOARD' section on the left with 'MY ASSIGNED CASES' and a list of links, and a 'QUICK TRACKER' sidebar on the right. The footer contains 'About MO&FP | Privacy & Security | Disclaimer | Feedback' and the 'USA.gov' logo.

Figure 5.3

The participant's details page will appear (Figure 5.4).



Figure 5.4

The Participant's Record Screen

4. Participant's Demographic Information

The center of the page contains the participant's personal and demographic details such as their contact and eligibility information (Figure 6.1). Click Edit to make changes to the participant's information.

Military OneSource
CARE MANAGEMENT SYSTEM

SEARCH PROFILE LOGOUT

View Participant Create Case Edit

Participant Name and Information

First	Middle	Last	Suffix
Jake	M	Smith	
DOB	Gender	Marital Status	
5/4/1980	Male	Married	

Current Address

Address: 456 Poplar Lane
City: Fredericksburg VA, State: VA, Postal Code: 22406
Country: United States

Mailing Address

Address: 3464 Nobel Drive
City: San Diego CA, State: CA, Postal Code: 92122
Country: United States

Telephone

Preferred Phone	Work Phone	Cell Phone
555-789-1658		

Email

Email Address: jakesmith@email.com

Additional Information

Requires Interpreter	Referred By
No	

Eligibility Info

Service Member? Yes
Relation: Self
Pay Grade: W-2
Branch of SVC: Air Force
Eligibility Status: Active Duty
Closest Installation: Fort Carson

Participant Overview

Name: [Jake M. Smith](#)
Participant ID: 38
Current Address: 456 Poplar Lane, Fredericksburg, VA 22406, United States
Phone: 555-789-1658
DOB: 5/4/1980

RELATED CASES

[Financial Counseling Adoption](#)

Done

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Figure 6.1

5. Crisis / DTW / MR Tab

Clicking on the Crisis / DTW / MR will open the Crisis Call drawer with the participant's personal information defaulted (Figure 6.2 and Figure 6.3). See [Crisis / Duty to Warn / Mandated Report](#) for instructions for logging crisis calls.

Military OneSource CARE MANAGEMENT SYSTEM

SEARCH PROFILE LOGOUT

View Participant Create Case Edit

Participant Name and Information

First	Middle	Last	Suffix
Jake	M	Smith	

DOB: 5/4/1980 Gender: Male Marital Status: Married

Current Address

Address: 456 Poplar Lane
City: Fredericksburg VA State: VA Postal Code: 22406
Country: United States

Mailing Address

Address: 3464 Nobel Drive
City: San Diego CA State: CA Postal Code: 92122
Country: United States

Telephone

Preferred Phone: 555-789-1658 Work Phone: Cell Phone:

Email

Email Address: jakesmith@email.com

Eligibility Info

Service Member? Yes
Relation: Self
Pay Grade: W-2
Branch of SVC: Air Force
Eligibility Status: Active Duty
Closest Installation: Fort Carson

RELATED CASES

[Financial Counseling Adoption](#)

CRISIS/DIV/MR PROGRAM REFERRALS RELATED CASES

[About MC&FP](#) | [Privacy&Security](#) | [Disclaimer](#) | [Feedback](#)

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Figure 6.2

Military OneSource
CASE MANAGEMENT SYSTEM

SEARCH PROFILE LOGOUT

View Participant Create Case Edit

DASHBOARD

PARTICIPANT OVERVIEW

Name
[Jake M. Smith](#)

Participant ID
38

Current Address
456 Poplar Lane
Fredericksburg, VA 22406
United States

Phone
555-789-1658

DOB
5/4/1980

RELATED CASES

[Financial Counseling Adoption](#)

CRISIS /DTW/MR

Adverse Incident

GOV POC

Followed Internal Workflow

Crisis Call

Trace Call Required

Police

Base Police

EMS

MOS Triage Consultant

Followed internal workflow

Duty to Warn

Police

Base Police

EMS

Medical Facility

Followed internal workflow

Mandated Report

Adult Protective Services

Child Protective Services

Civilian Expeditionary Command

FAP (Installation Domestic Abuse, Child Abuse)

Followed internal work flow

Reserve Guard or Recruiting POC

First M Last
Jake M Smith

Home Phone DOB
555-789-1658 5/4/1980

Notes

POC Name POC Phone POC email

2nd POC Name 2nd POC Phone 2nd POC Email

3rd POC Name 3rd POC Phone 3rd POC email

Clear Save

jakesmith@email.com

Additional Information

Requires Interpreter Referred By
No

Done

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Figure 6.3

6. Program Referrals

Clicking on the Program Referrals tab will display the various programs that the participant can be referred to (Figure 6.4 and Figure 6.5). See the [Program Referrals](#) section of this document for instructions on creating program referrals.

Military OneSource CARE MANAGEMENT SYSTEM

SEARCH PROFILE LOGOUT

View Participant Create Case Edit

DASHBOARD

PARTICIPANT OVERVIEW

Name
[Jake M Smith](#)

Participant ID
38

Current Address
456 Poplar Lane
Fredericksburg, VA 22406
United States

Phone
555-789-1658

DOB
5/4/1980

RELATED CASES

[Financial Counseling Adoption](#)

Participant Name and Information

First	Middle	Last	Suffix
Jake	M	Smith	

DOB 5/4/1980 **Gender** Male **Marital Status** Married

Current Address

Address
456 Poplar Lane

City Fredericksburg **State** VA **Postal Code** 22406

Country
United States

Mailing Address

Address
3464 Nobel Drive

City San Diego **State** CA **Postal Code** 92122

Country
United States

Telephone

Preferred Phone	Work Phone	Cell Phone
555-789-1658		

Email

Email Address
jakesmith@email.com

Additional Information

Requires Interpreter No **Referred By**

Eligibility Info

Service Member?
Yes

Relation
Self

Pay Grade
W-2

Branch of SVC
Air Force

Eligibility Status
Active Duty

Closest Installation
Fort Carson

CRISIS / OI / W / R

PROGRAM REFERRALS

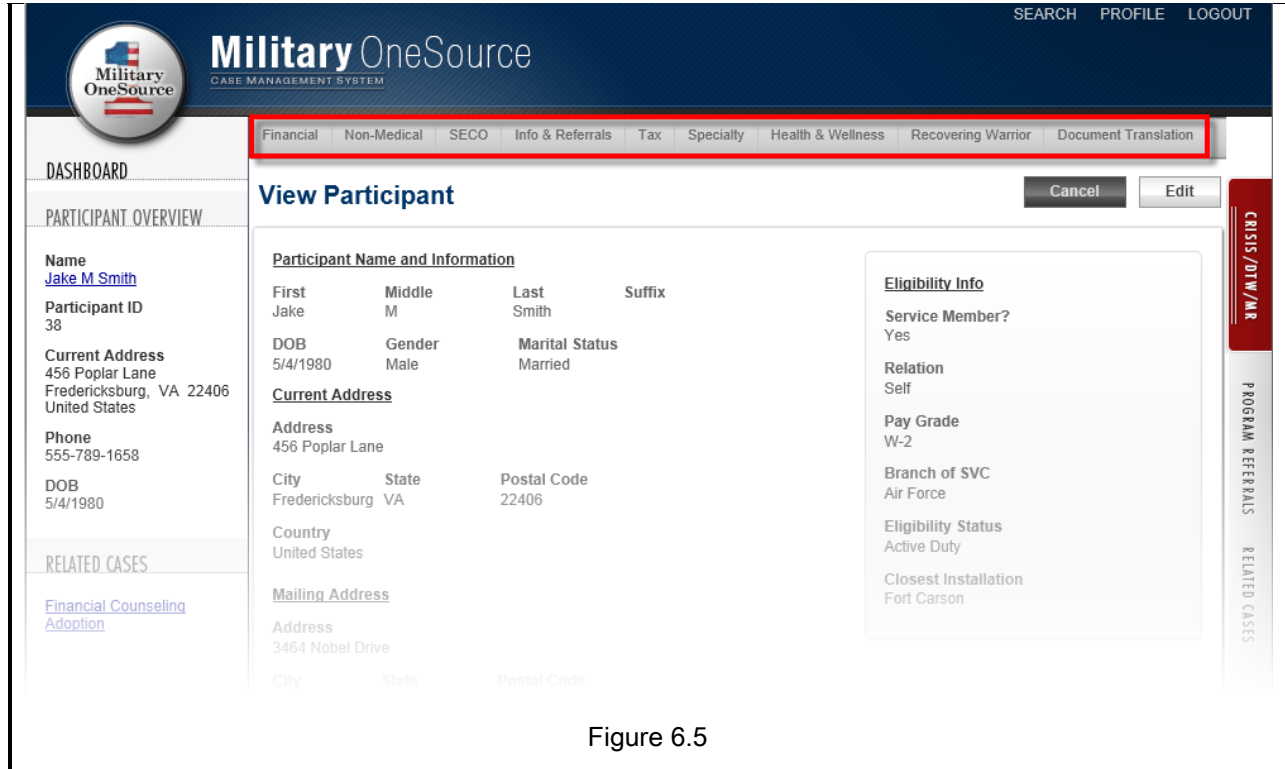
RELATED CASES

Done

About MC&FP | Privacy&Security | Disclaimer | Feedback

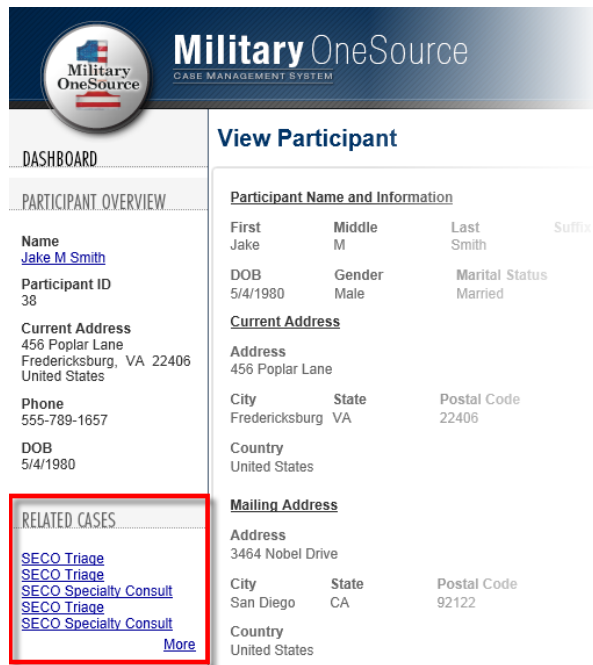
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Figure 6.4



7. Related Cases

The Related Cases section displays the participant's most recent active cases (up to five).



To view all of a participant's cases, click on the Related Cases tab.

Military OneSource
CASE MANAGEMENT SYSTEM

SEARCH PROFILE LOGOUT

View Participant Create Case Edit

DASHBOARD

PARTICIPANT OVERVIEW

Name
[Jake M. Smith](#)

Participant ID
38

Current Address
456 Poplar Lane
Fredericksburg, VA 22406
United States

Phone
555-789-1658

DOB
5/4/1980

RELATED CASES

[Financial Counseling](#)
[Adoption](#)

Participant Name and Information

First	Middle	Last	Suffix
Jake	M	Smith	
DOB	Gender	Marital Status	
5/4/1980	Male	Married	

Current Address

Address	City	State	Postal Code
456 Poplar Lane	Fredericksburg	VA	22406
Country	United States		

Mailing Address

Address	City	State	Postal Code
3464 Nobel Drive	San Diego	CA	92122
Country	United States		

Telephone

Preferred Phone	Work Phone	Cell Phone
555-789-1658		

Email

Email Address
jakesmith@email.com

Additional Information

Requires Interpreter	Referred By
No	

Eligibility Info

Service Member?
Yes

Relation
Self

Pay Grade
W-2

Branch of SVC
Air Force

Eligibility Status
Active Duty

Closest Installation
Fort Carson

CRISIS/OW/M/R

PROGRAM DETAILS

RELATED CASES

Done

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Figure 6.7

Clicking on a case will display its details (Figure 6.8 and 6.9).

Military OneSource
CASE MANAGEMENT SYSTEM

SEARCH PROFILE LOGOUT

Related Cases

Case Id	Case Name	Date Opened	Date Modified	Status
288	Specialty Consult: Adoption	1/11/2013	1/11/2013 11:34:29 AM	Active
289	Financial Counseling	1/11/2013	1/11/2013 11:35:42 AM	Active
291	SECO Triage	1/14/2013	4/15/2013 1:25:53 PM	Closed
293	SECO Specialty Consult	1/14/2013	1/18/2013 1:47:25 PM	Active
294	Specialty Consult: Bulk Fulfillment	1/14/2013	1/14/2013 1:10:46 PM	Active
295	SECO Specialty Consult	1/18/2013	1/18/2013 1:47:25 PM	Active
298	SECO Triage	1/29/2013	1/31/2013 9:37:07 AM	Closed
302	SECO Triage	1/29/2013	1/29/2013 1:20:49 PM	Closed
303	SECO Specialty Consult	1/29/2013	1/29/2013 1:20:48 PM	Active
324	Health & Wellness Coaching	2/4/2013	2/4/2013 8:13:14 AM	Active
390	SECO Triage	2/28/2013	2/28/2013 2:06:49 PM	Closed
432	SECO Triage	4/8/2013	4/8/2013 5:15:56 AM	Active
440	SECO Triage	4/15/2013	4/18/2013 8:21:29 AM	Closed
579	SECO Triage	4/19/2013	4/19/2013 8:59:30 AM	Active
581	SECO Triage	4/19/2013	4/19/2013 8:59:39 AM	Active

Done

Participant Overview:
Name: [Jake M Smith](#)
Participant ID: 38
Current Address: 456 Poplar Lane, Fredericksburg, VA 22406, United States
Phone: 555-789-1657
DOB: 5/4/1980

Related Cases:
[SECO Triage](#)
[SECO Triage](#)
[SECO Specialty Consult](#)
[SECO Triage](#)
[SECO Specialty Consult](#)
[More](#)

CRISIS/OTW/MR
PROGRAM REFERRALS
RELATED CASES

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Figure 6.8

Military OneSource
CARE MANAGEMENT SYSTEM

SEARCH PROFILE LOGOUT

SECO Triage Case ID: 291 (Closed)

DASHBOARD

PARTICIPANT OVERVIEW

Name
[Jake M. Smith](#)

Participant ID
38

Current Address
456 Poplar Lane
Fredericksburg, VA 22406
United States

Phone
555-789-1657

DOB
5/4/1980

RELATED CASES

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

Handoff Type Warm Handoff **Assigned to** Seco Advisor **Urgent** No

Interpreter Requested
No

Handoff Notes

Date and Time of Call: Monday, January 14, 2013 12:46 PM

Contact Notes [add](#)

▶ 1 Seco Advisor 4/15/2013 1:25:53 PM

Participant Information

Service Member Name Road Runner MyCAA Eligible

SECO I&R

Categories Career Connection
Career Exploration
Education and Training

Tech Help Provided For

Referred To

Comments

SECO Specialty Consult Case ID: 293

Handoff Type Warm Handoff **Assigned to** Seco Consultant

Follow Up Date **Follow Up Time** **Follow Up Reason**

Handoff Notes

Done

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Figure 6.9

Creating a Participant Record

Before you can create a new participant, the system will require you to first search for the person to verify that they don't already have a record. Once you have performed a search, the Add New button on the search page will appear (Figure 7.1).

1. After verifying that the participant doesn't already exist on the search page, click Add New.

The screenshot shows the Military OneSource search interface. At the top, there are navigation links for SEARCH, PROFILE, and LOGOUT. The main header includes the Military OneSource logo and the text 'Military OneSource CARE MANAGEMENT SYSTEM'. On the left, there is a 'DASHBOARD' section with a link to 'UNATTACHED CRISIS CALLS' and a list of names including 'test', 'Little J Horner', 'John L Jones', 'Anna', 'Anna Tester', 'Test Tester', and several '[Unknown]' entries. The main search area is titled 'Search' and contains several input fields: 'First Name', 'Middle Name', 'Last Name' (with 'Johns' entered), 'Participant ID', 'Phone', 'DOB', 'Case Number', and 'Primary Email'. There are 'Search' and 'Clear' buttons. Below the search fields, a table displays 'Participant search found 7 participants'. The table has columns for Name, Address, City, State, Postal Code, Phone, and DOB. The participants listed are: Johnson, Mark; Johnson, Huia; Johnson, Magic Man; Johnson, Sally A.; and Johnson, Camarie Boyd. At the bottom right of the search results, there is a red-bordered button labeled '+ Add New'. The footer contains links for 'About Military OneSource', 'Privacy & Security', 'Disclaimer', 'References', and 'Feedback', along with the USA.gov logo and other icons.

Name	Address	City	State	Postal Code	Phone	DOB
Johnson, Mark	1040 Bethel Street	Alexandria	VA	22311	452-658-9658	8/8/1979
Johnson, Huia	4444 Furthemore Street	JOHNSON	NC	28132	922-102-1032	4/12/1969
Johnson, Magic Man	12345 Marry Lane.	Buckingham	CT	11111	123-345-5674	4/12/1962
Johnson, Sally A.	950 South Walnut Street	Friend	NE			1/30/1981
Johnson, Camarie Boyd	9528 59th Ave., SW, #FF104	Lakewood	WA	98499	832-867-9309	1/13/1994

Figure 7.1

2. Enter the participant's information.

Required fields are designated by *

Begin by entering their personal information such as their name, date of birth, address(es), gender, marital status, and phone numbers and email address (Figure 7.2).

The **Confidential** checkboxes next to the phone and email address fields signify that the provided phone number/email address is private, and therefore safe for contacting the participant regarding private matters (Figure 7.2).

Military OneSource
CARE MANAGEMENT SYSTEM

SEARCH PROFILE LOGOUT

Create New Participant * indicates a required field

Personal Information:

First* Middle Last* Suffix
DOB* Gender* Marital Status*
Current Address
City State Postal Code Country
Mailing Address
City State Postal Code Country
Preferred Phone Confidential
Work Phone
Cell Phone Confidential
Email Address Confidential

Eligibility Information:

Service Member?
 Yes
 No

*Relation
Please Select

*Branch of SVC
Please Select

*Pay Grade
Please Select

*Eligibility Status
Please Select

Recovering Warrior
 Retiring Within 180 Days
 Discharged Within 180 Days

Closest Installation
Enter an installation...

Referred By:

Referred By
Please Select
Other Source

Cancel Save Done

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Figure 7.2

Continue entering their personal information.

- If the participant requires interpretation assistance, select the **Requires Interpreter** checkbox and then select their language from the dropdown list (Figure 7.3).
- Select how the participant heard of or was referred to MOS in the **Referred By** list. If you select 'Other', type the referral source in the textbox (Figure 7.3).

Create New Participant * indicates a required field

Name
First* Middle Last* Suffix

DOB* ***Gender** ***Marital Status**

Current Address
City State Postal Code Country

Mailing Address
City State Postal Code Country

Preferred Phone Confidential

Work Phone

Cell Phone Confidential

Email Address Confidential

Requires Interpreter

Referred By

Other Source

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 Save Done

Figure 7.3

Then, complete the eligibility information for the sponsor. Indicate if the sponsor is a Recovering Warrior or has an upcoming retirement by selecting the checkboxes (Figure 7.4).

Military OneSource
CARE MANAGEMENT SYSTEM

SEARCH PROFILE LOGOUT

Create New Participant * indicates a required field

Eligibility Information

Service Member?
 Yes
 No

*Relation
Please Select

*Branch of SVC
Please Select

*Pay Grade
Please Select

*Eligibility Status
Please Select

Recovering Warrior
 Retiring Within 180 Days
 Discharged Within 180 Days

Closest Installation
Enter an installation...

Cancel Save Done

Figure 7.4

3. Enter the participant's closest installation.

Begin by entering either the full name or partial name of the installation. Once the installation appears, click on its name. The installation name will then populate into the Closest Installation field (Figure 7.5).

Military OneSource
CASE MANAGEMENT SYSTEM

SEARCH PROFILE LOGOUT

Create New Participant * indicates a required field

Eligibility Information

Service Member?
 Yes
 No

*Relation
Please Select

*Branch of SVC
Please Select

*Pay Grade
Please Select

*Eligibility Status
Please Select

Recovering Warrior
 Retiring Within 180 Days
 Discharged Within 180 Days

Closest Installation
Enter an installation...
Fort
Please enter 1 or more characters

Cancel Save Done

USA.gov

Figure 7.5

4. Click Done to save and close the participant's record.

The system will check to see if all required fields were entered and display any errors it finds (such as a phone number in an invalid format or leaving the email address blank).

You will need to fix the errors and click the Done button again until all errors have been resolved.

Then, the participant's record will be added to the system.

The screenshot shows the 'Create New Participant' form in the Military OneSource Case Management System. The form is divided into several sections: Name, Personal Information (DOB, Gender, Marital Status), Address (Current and Mailing), Phone Numbers (Preferred, Work, Cell), and Email Address. There is also an 'Eligibility Information' section with radio buttons for 'Service Member?' (Yes/No), dropdown menus for 'Relation', 'Branch of SVC', 'Pay Grade', and 'Eligibility Status', and checkboxes for 'Recovering Warrior', 'Retiring Within 180 Days', and 'Discharged Within 180 Days'. A 'Closest Installation' dropdown is also present. At the bottom right, there are 'Cancel', 'Save', and 'Done' buttons. The 'Done' button is highlighted with a red box. The top of the page has a navigation bar with 'SEARCH', 'PROFILE', and 'LOGOUT' links. The bottom of the page has a footer with 'About, MC&FP, Privacy&Security, Disclaimer, Feedback' and 'USA.gov' logo.

Figure 7.6

Editing a Participant

1. Select the participant from the Search screen.

Click on the participant's name to open their record.

The screenshot shows the Military OneSource Search interface. On the left is a sidebar with a 'DASHBOARD' and a list of 'UNATTACHED CRISIS CALLS' including names like Josh Jacobs and Dante Peake. The main area is titled 'Search' and contains several input fields: First Name (Joan), Middle Name, Last Name, Participant ID, Phone, DOB, and Primary Email. There are 'Search' and 'Clear' buttons. Below the search fields, a table displays 'Participant search found 1 participants'. The table has columns for Name, Address, City, State, Postal Code, Phone, and DOB. The first row shows 'McCormick, Joan' with address '1234 Erewhon Rd.', city 'Erewhon', state 'VT', postal code '77777', phone '555-555-5555', and DOB '2/2/1983'. The name 'McCormick, Joan' is highlighted with a red box. At the bottom right of the table area is an 'Add New' button. The footer includes 'About MCAFIP | Privacy & Security | Disclaimer | Feedback' and 'USA.gov'.

Figure 8.1

2. Click Edit

The screenshot shows the 'View Participant' screen for Joan McCormick. The top navigation bar includes 'SEARCH', 'PROFILE', and 'LOGOUT'. The page title is 'View Participant' and there are 'Create Case' and 'Edit' buttons. The 'Edit' button is highlighted with a red box. The main content area is divided into sections: 'Participant Name and Information' (First: Joan, Middle, Last: McCormick, Suffix), 'DOB: 2/2/1983', 'Gender: Female', and 'Marital Status: Married'. There is also a 'Current Address' section with fields for Address (1234 Erewhon Rd.), City (Erewhon), State (VT), and Postal Code (77777). On the right, an 'Eligibility Info' section shows 'Service Member? No', 'Relation: Family Member Spouse', 'Pay Grade: E-4', and 'Branch of SVC: Marine Corps'. A sidebar on the left shows 'PARTICIPANT OVERVIEW' with fields for Name (Joan McCormick), Participant ID (37), and Current Address. A vertical sidebar on the right contains 'CRISIS / DTW / MR' and 'PROGRAM 11'.

Figure 8.2

The participant's information will become editable (Figure 8.3).

3. Make the desired updates, and then click Done.

If the required information for the participant is complete, the system will save the updates.

If any errors display, correct the issue and then click Done again until all errors are corrected.

The screenshot shows the 'Edit Participant' form in the Military OneSource CMS. The form is divided into several sections: 'PARTICIPANT OVERVIEW' on the left, 'RELATED CASES' below it, and the main 'Edit Participant' form area. The 'Edit Participant' form includes fields for Name (First, Middle, Last, Suffix), DOB, Gender, Marital Status, Current Address, Mailing Address, Preferred Phone, Work Phone, Cell Phone, Email Address, and Eligibility Information. The 'Done' button is highlighted with a red box.

Participant Overview:
Name: Joan McConnick
Participant ID: 37
Current Address: 1234 Erewhon Rd, Erewhon, VT 77777, United States
Phone: 555-555-5555
DOB: 2/2/1983

Related Cases:
SECO Triage
SECO Triage

Edit Participant Form:
First: Joan, Middle: , Last: McConnick, Suffix:
DOB: 2/2/1983, Gender: Female, Marital Status: Married
Current Address: 1234 Erewhon Rd., City: Erewhon, State: VT, Postal Code: 77777, Country: United States
Mailing Address: same, City: same, State: --, Postal Code: , Country: Please Select
Preferred Phone: 555-555-5555, Confidential:
Work Phone:
Cell Phone:
Email Address: jmac@jmac.com, Confidential:
Eligibility Information: Service Member? No, Relation: Family Member Spouse, Branch of SVC: Marine Corps, Pay Grade: E-4, Eligibility Status: Active Duty, Recovering Warrior: , Retiring Within 180 Days: , Discharged Within 180 Days: , Closest Installation: Fort Benning, Referred By: Other, neighbor

Figure 8.3

Crisis / Duty to Warn / Mandated Report

Logging a call

When a crisis, duty to warn / mandated report, or adverse incident call (“crisis call”) comes in, the primary goal is to capture as much information as possible about the call. Then, you will attach the crisis call to the participant’s record in the system.

1. From anywhere in the system, click on the red CRISIS / DTW / MR tab.

The CRISIS / DTW / MR tab appears along the right-hand side of every page within the system.

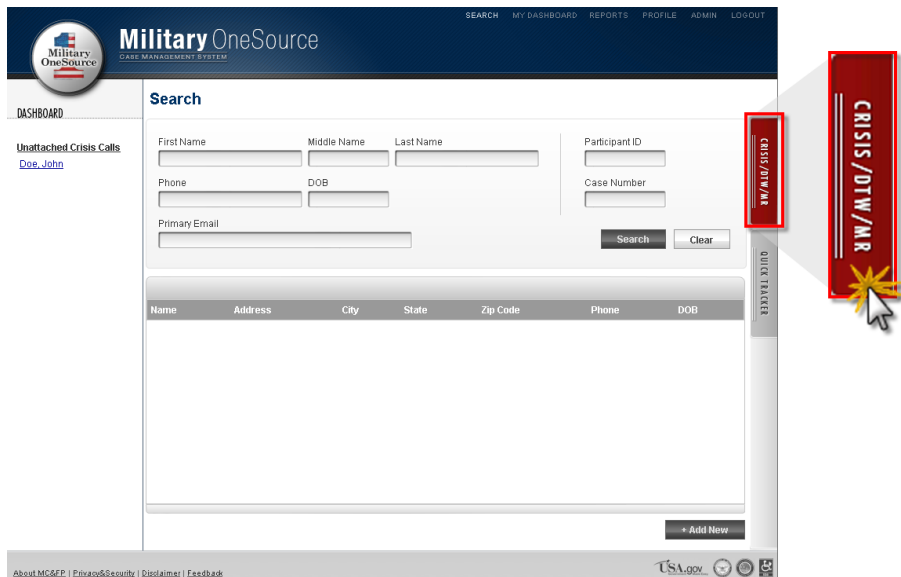


Figure 9.1

When clicked the drawer will slide out to the left.

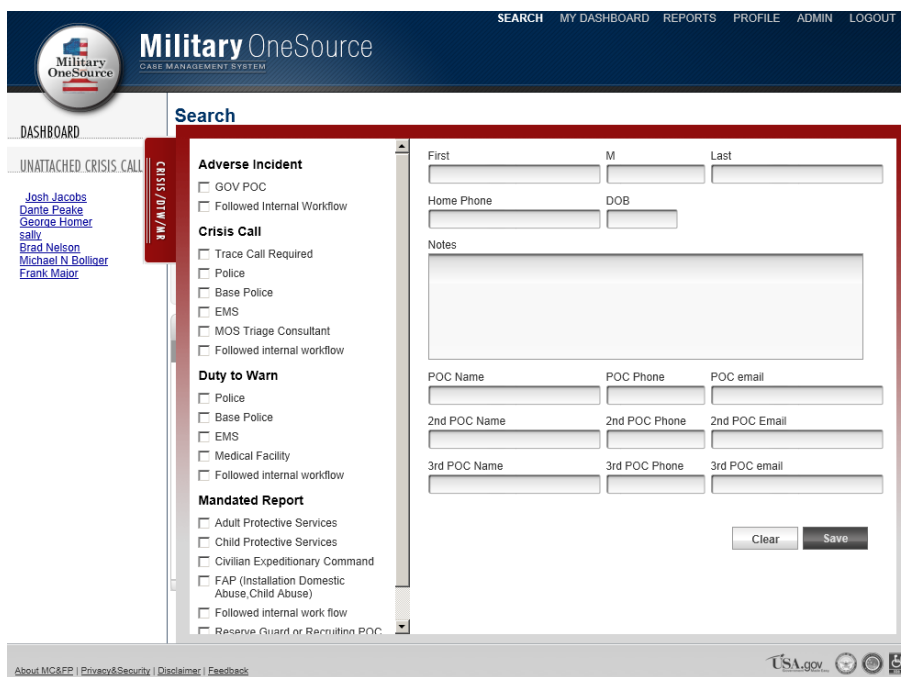


Figure 9.2

2. Enter any available information about the call.

Select the categories applicable to the nature of the call, and try to enter as much information as you can about the caller (Figure 9.3). If you opened the Crisis / DTW / MR drawer from a participant's screen,

their information will default in the form. You can clear or update the caller's information if needed. Add a summary of the issue and any relevant notes in the Notes textbox.

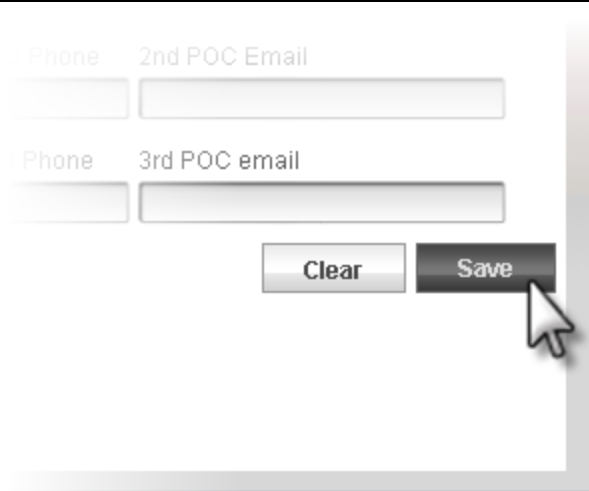
Finally, enter the names, phone numbers, and email addresses of any points of contact for the incident, if available.

The screenshot shows a web form for incident reporting. On the left is a vertical sidebar with a red header containing the text 'CRISIS/DTW/M/R'. The sidebar lists several categories with checkboxes: 'Adverse Incident' (GOV POC, Followed Internal Workflow), 'Crisis Call' (Trace Call Required, Police, Base Police, EMS, MOS Triage Consultant, Followed internal workflow), 'Duty to Warn' (Police, Base Police, EMS, Medical Facility, Followed internal workflow), and 'Mandated Report' (Adult Protective Services, Child Protective Services, Civilian Expeditionary Command, FAP (Installation Domestic Abuse, Child Abuse), Followed internal work flow, Reserve Guard or Recruiting POC). The main form area contains input fields for 'First', 'M', and 'Last' names; 'Home Phone' and 'DOB'; a large 'Notes' text area; and three rows of contact information labeled '1st POC', '2nd POC', and '3rd POC', each with fields for Name, Phone, and email. At the bottom right of the form are 'Clear' and 'Save' buttons.

Figure 9.3

3. Click Save

When you have entered all available information for the call, click the **Save** button (Figure 9.4). The drawer will close and the crisis call will be saved in the system.



The screenshot shows a form with two rows of input fields. The first row is labeled 'Phone' and '2nd POC Email'. The second row is labeled 'Phone' and '3rd POC email'. Below the input fields are two buttons: 'Clear' and 'Save'. A mouse cursor is pointing at the 'Save' button.

Figure 9.4

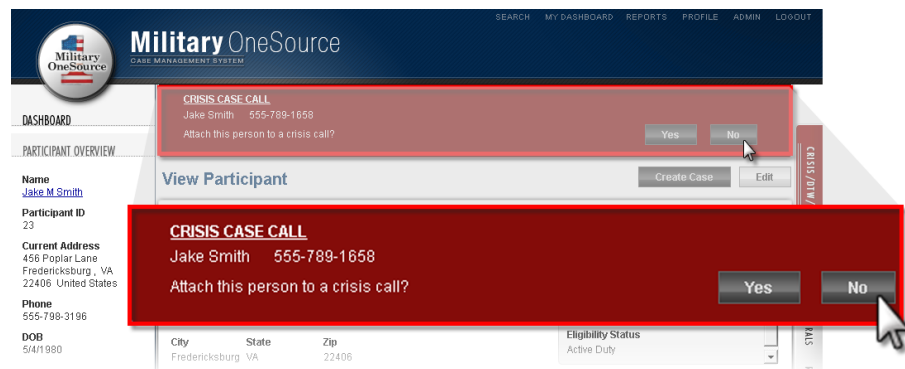
The next step will be to associate the crisis call to a participant's record. You can do that immediately after saving the call (see [Associating a Crisis / Duty to Warn / Mandated Report Call to a Participant's Record](#)), or you can postpone for a later time if needed by following the next steps.

Postpone Associating a Crisis Call to a Participant

The process for postponing a crisis call will be slightly different depending upon whether you were on the participant's screen or the search screen when you created the crisis call.

1. If you were on the participant's screen, click No to return to the search page. If you were already on the Search screen, skip to the next step.

If you were on the participant's screen when you created the crisis call, a banner will display at the top of the page asking if you would like to attach the call to the current participant. Click **No**. The search screen will then display.



The screenshot shows the Military OneSource interface. At the top, there is a navigation bar with links for SEARCH, MY DASHBOARD, REPORTS, PROFILE, ADMIN, and LOGOUT. Below this is the Military OneSource logo and the text 'CASE MANAGEMENT SYSTEM'. The main content area is divided into two sections. The left section is titled 'PARTICIPANT OVERVIEW' and displays information for 'Jake M. Smith', including his Participant ID (23), Current Address (456 Poplar Lane, Fredericksburg, VA 22406, United States), Phone (555-798-3196), and DOB (5/4/1980). The right section is titled 'View Participant' and displays information for 'Jake Smith', including his Crisis Case Call ID (555-789-1658) and Eligibility Status (Active Duty). A red banner is overlaid on the top right of the page, asking 'Attach this person to a crisis call?' with 'Yes' and 'No' buttons. A mouse cursor is pointing at the 'No' button.

Figure 10.1

2. Click Not Now in the search screen banner

Click **Not Now** in the banner at the top of the search screen (Figure 10.2).

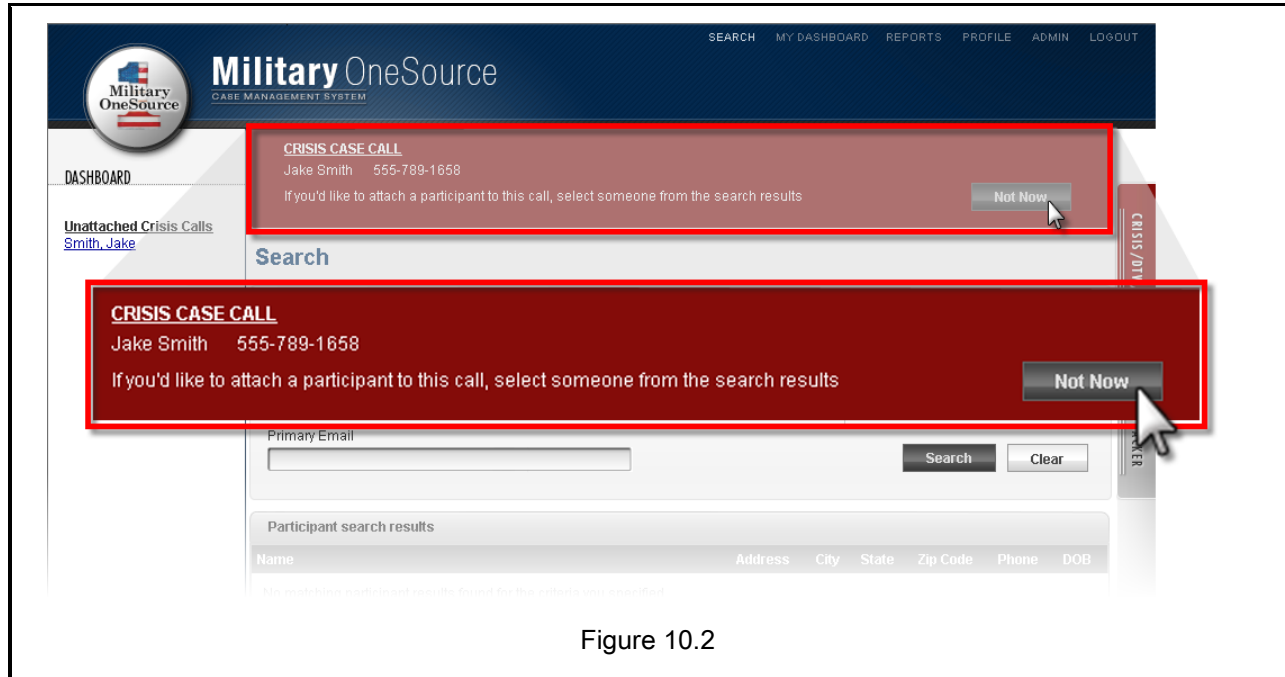


Figure 10.2

The crisis call will display in the Unattached Crisis Calls dashboard on the search page until the call can be attached to a participant's record.



Figure 10.3

Clicking on the link in the dashboard will bring you to the details page for that call (Figure 10.4). Click **Done** to exit the page, or click **Attach** when you are ready to associate the crisis call to a

participant's record. See [Associating a Crisis / Duty to Warn / Mandated Report Call to a Participant's Record](#) for instructions.

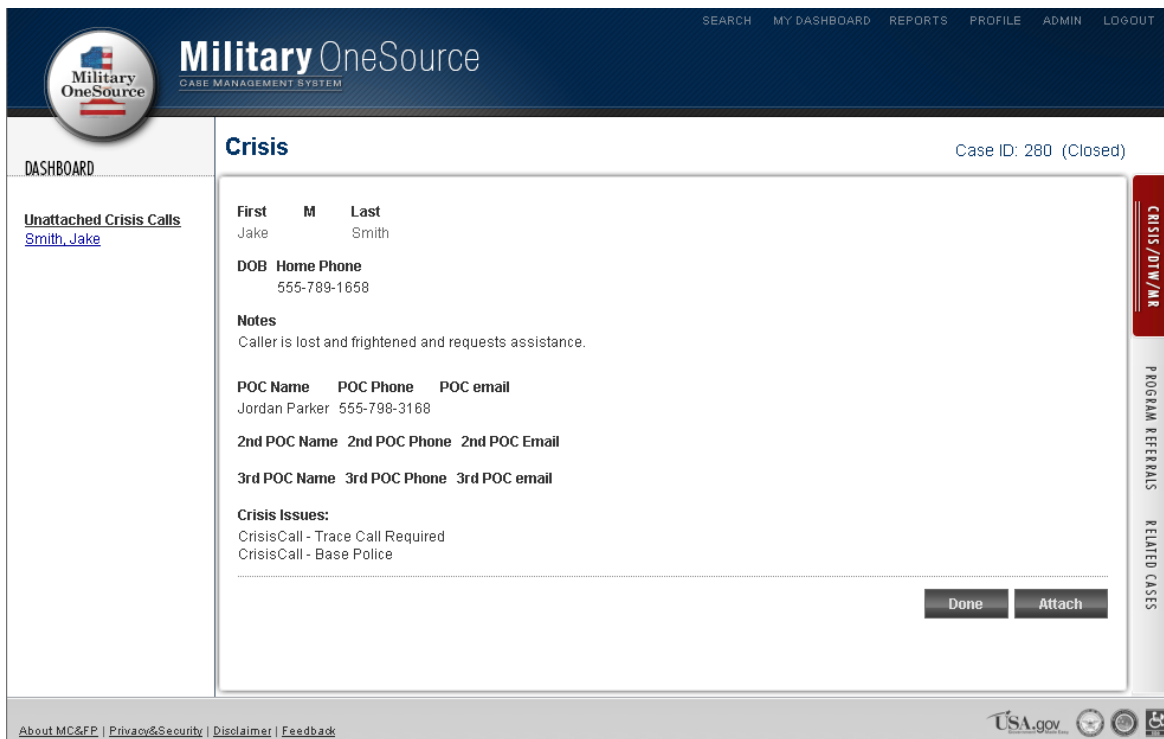


Figure 10.4

Associating a Crisis / Duty to Warn / Mandated Report Call to a Participant's Record

When the crisis call is saved, the CRISIS / DTW / MR drawer will close. The system will then ask if you would like to associate the call to a participant's record. Depending on which page you were on when you clicked on the CRISIS / DTW / MR tab, there will be a couple of different ways to do this:

- If you clicked on the CRISIS / DTW / MR tab from a participant's page, skip to [Step 4 below](#).
- If you were on the search page, continue with the following steps.

1. Associating a crisis call to a participant from the search screen

If you were on the Search page when you clicked on the CRISIS / DTW / MR tab, you will now see the caller's name (if entered) displaying in the Unattached Crisis Calls Dashboard on the left-hand side of the screen.

The caller's name will remain in the dashboard until they are associated to a participant's record (Figure 11.1).

To associate the call to a participant, first check to see if the participant already exists (Figure 11.2).



Figure 11.1

2. Search for the participant.

The system will automatically execute a search using information about the caller if provided. If no records are returned at first you may need to update/remove some of the prepopulated information (such as the phone number) and re-execute the search in order to correctly determine if the caller already has a participant's record or not (Figure 11.2).

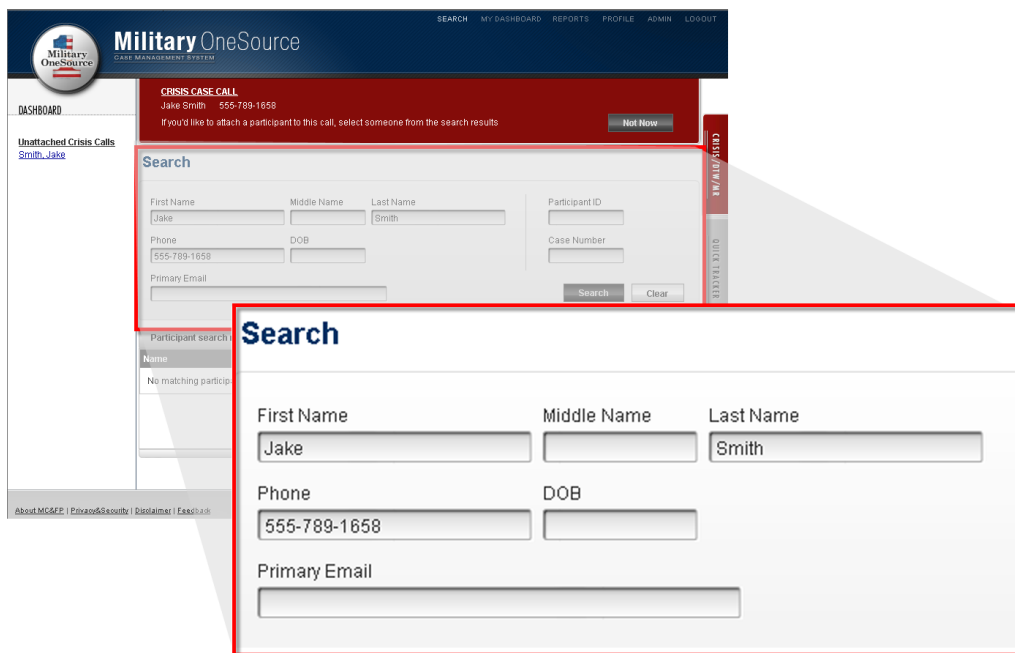


Figure 11.2

3. If the participant is found, select them from the search results. Otherwise, you will need to create the participant's record in the system. See [Associating a Crisis Call to a New Participant](#) for instructions.

If the participant is found in the system, select their record in the search results by clicking on their name.

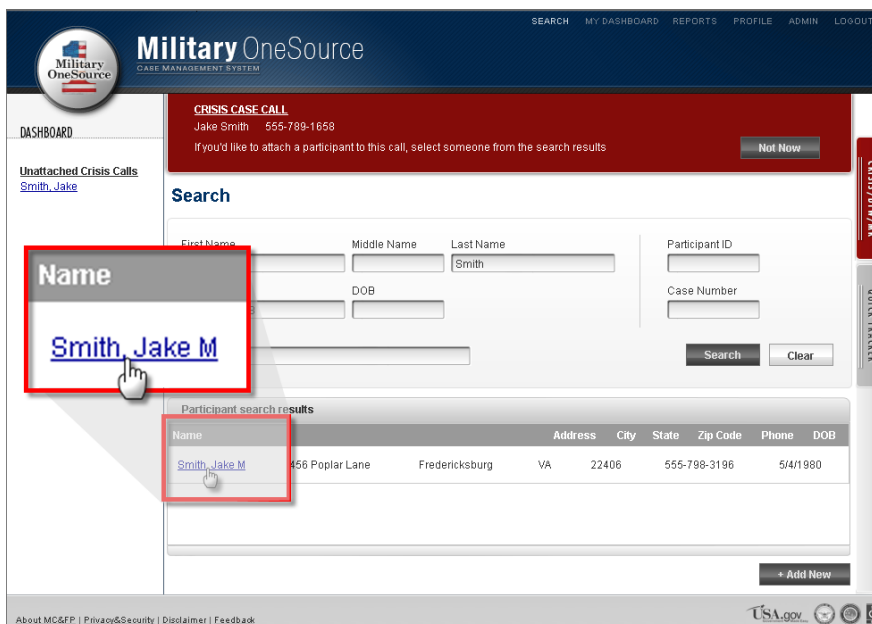


Figure 11.3

4. Click Yes to attach the crisis call to the participant.

The participant's details page will display. Click **Yes** at the top of the page to associate the call to that participant.

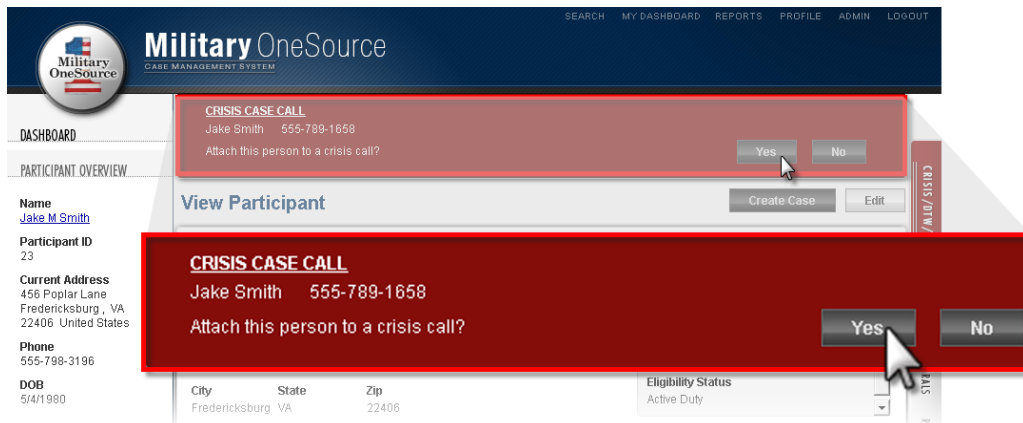


Figure 11.4

Once the call is associated to the participant's record it will appear among that participant's Related Cases.

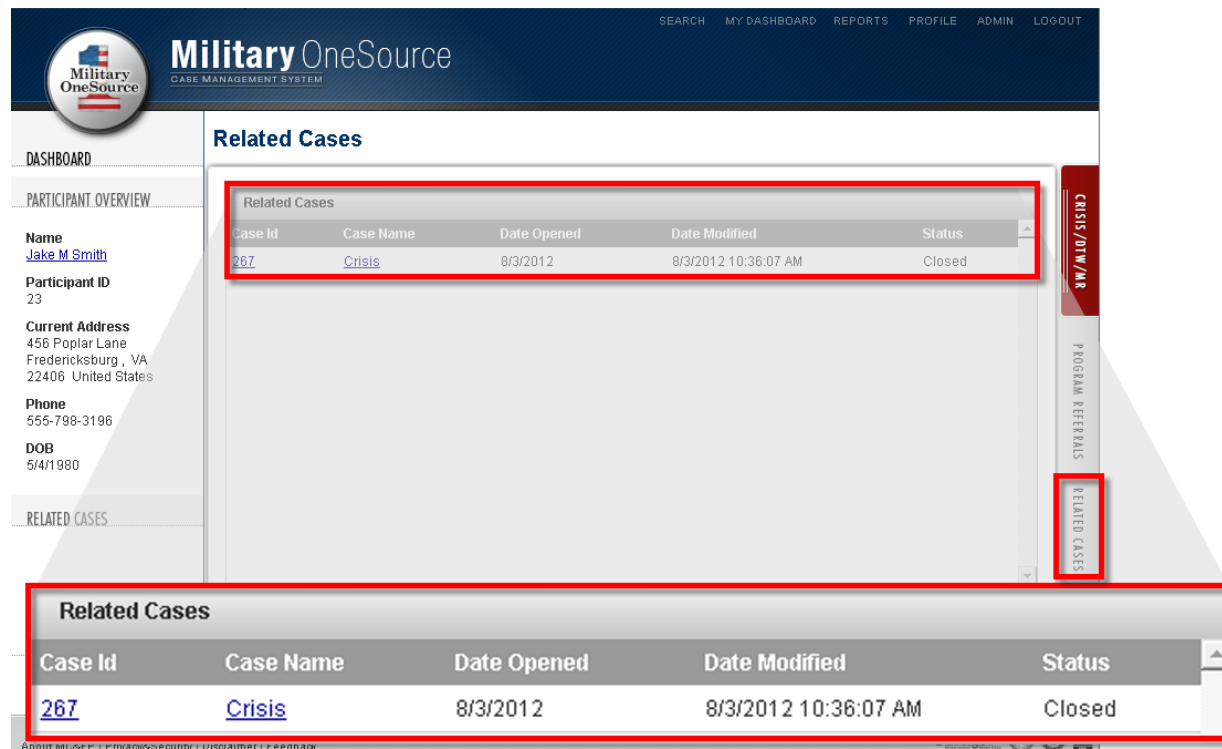


Figure 11.5

Associating a Crisis Call to a New Participant

1. Click Add New on the search screen

If you were not able to locate the participant's record on the search page, the participant will need to be added to the system.

Click the Add New button at the bottom of the page. This button will only appear after a search has been completed.

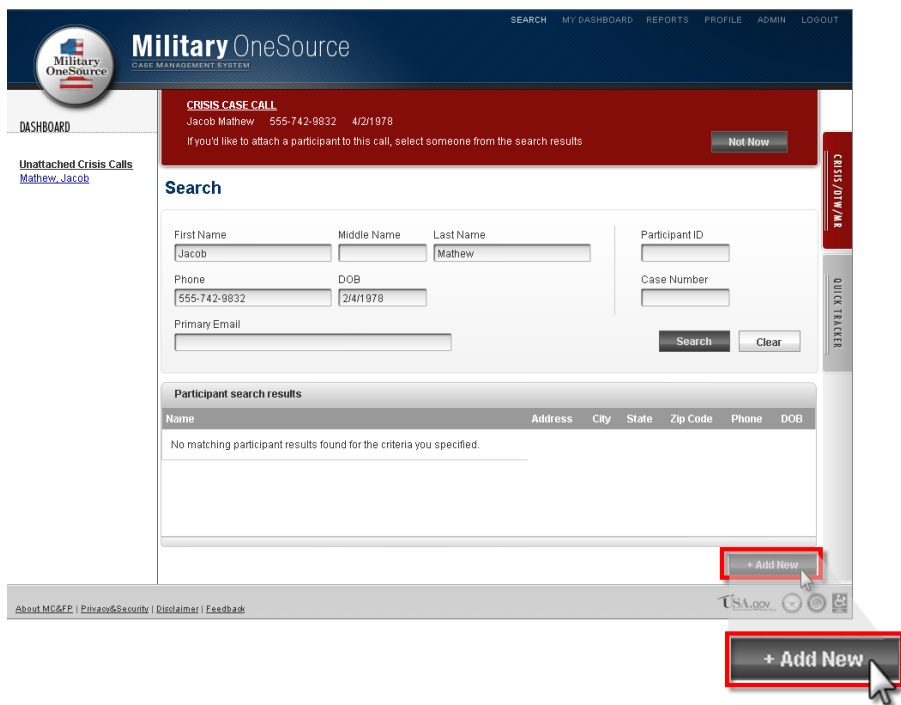


Figure 12.1

2. Enter participant's information, and then click Done

For guidance in creating a new participant's record, see [Creating a Participant Record](#).

CRISIS CASE CALL
Jacob Mathew 555-742-9832 4/2/1978
If you'd like to attach a participant to this call, select someone from the search results Not Now

Create New Participant

* indicates a required field

Name
First* Middle Last* Suffix
DOB* Gender* Marital Status
Current Address
City State Postal Code Country
Mailing Address
City State Postal Code Country
Preferred Phone Confidential
Work Phone
Cell Phone Confidential
Email Address Confidential Requires Interpreter Referred By
Other Source

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
Enter an installation...

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

Figure 12.2

3. Click Yes in the Crisis Case Call banner

CRISIS CASE CALL
Jacob Mathew 555-742-9832 4/2/1978
Attach this person to a crisis call? Yes No

View Participant

CRISIS CASE CALL
Jacob Mathew 555-742-9832 4/2/1978
Attach this person to a crisis call? Yes No

City State Zip Eligibility Status
Fredericksburg VA 22406 Active Duty

Figure 12.3

The crisis call will now be associated to the participant's record. You can view the crisis call in the participant's Related Cases.

The screenshot displays the Military OneSource Case Management System interface. On the left, a sidebar contains navigation options: DASHBOARD, PARTICIPANT OVERVIEW, and RELATED CASES. The PARTICIPANT OVERVIEW section shows details for Jacob Mathew, including his name, participant ID (24), current address (798 Palm Avenue, San Diego, CA 92122), phone number (555-742-9832), and date of birth (4/21/1978). The main content area is titled 'Related Cases' and features a table with the following data:

Case Id	Case Name	Date Opened	Date Modified	Status
267	Crisis	8/3/2012	8/3/2012 10:36:07 AM	Closed

Below the main table, a zoomed-in view of the same table is shown, also highlighted with a red border. The table structure and data are identical to the one above. The interface includes a top navigation bar with links for SEARCH, MY DASHBOARD, REPORTS, PROFILE, ADMIN, and LOGOUT. A vertical sidebar on the right contains links for CRISIS/OTW/WR, PROGRAM REFERRALS, and RELATED CASES. The footer contains links for ABOUT MILCOS, PRIVACY/SECURITY, DISCLAIMER, and FEEDBACK.

Figure 12.4

Program Referrals

1. Open the participant's record

Locate the participant on the search screen (see [Search for a Participant](#)) and click on their name to open their record.

The screenshot displays the Military OneSource search interface. The top navigation bar includes 'SEARCH', 'PROFILE', and 'LOGOUT'. The main search area contains fields for 'First Name', 'Middle Name', 'Last Name', 'Participant ID', 'Phone', 'DOB', and 'Case Number'. A 'Search' button is located below these fields. On the left side, there is a 'DASHBOARD' and a list of participants, with 'Smith, Jake M' highlighted in a red box. Below the search fields, a table titled 'Participant search found 9 participants' lists the search results. The table has columns for Name, Address, City, State, Postal Code, Phone, and DOB. The first row, 'Smith, Jake M', is highlighted. At the bottom of the page, there is a footer with 'About Military OneSource | Privacy & Security | Disclaimer | References | Feedback' and the USA.gov logo.

Name	Address	City	State	Postal Code	Phone	DOB
Smith, Jake M	456 Poplar Lane	Fredericksburg	VA	22406	555-789-1657	5/4/1980
Smith, Michael	256 Clark Street	Alexandria	VA	22311	456-154-2154	8/8/1978
Smith, Leslie	5 Smith Way	Hampton	VA	23669	757-888-8888	4/25/1986
Smith, Willow	123 Hawthorne Place	Fort Hood	TX	12344	123-456-7890	4/15/2013
Smith, Megan						4/2/2013
Smith, Tasha	4613 Green Meadow St	Killeen	TX	76549	910-229-9973	6/23/1981

Figure 13.1

2. Click on the Create Case button.

Military OneSource
CASE MANAGEMENT SYSTEM

SEARCH PROFILE LOGOUT

View Participant Create Case Edit

Participant Name and Information

First	Middle	Last	Suffix
Jake	M	Smith	

DOB 5/4/1980 **Gender** Male **Marital Status** Married

Current Address

Address: 456 Poplar Lane, Fredericksburg, VA 22406, United States

City: Fredericksburg VA, State: VA, Postal Code: 22406

Country: United States

Mailing Address

Address: 3464 Nobel Drive, San Diego, CA 92122

City: San Diego, State: CA, Postal Code: 92122

Country: United States

Telephone

Preferred Phone	Work Phone	Cell Phone
555-789-1657		

Email

Email Address: jakesmith@email.com

Additional Information

Requires Interpreter	Referred By
No	Website

Eligibility Info

Service Member? Yes

Relation: Self

Pay Grade: W-2

Branch of SVC: Navy

Eligibility Status: Active Duty

Closest Installation: Fort Carson

RELATED CASES

- [SECO Triage](#)
- [SECO Triage](#)
- [SECO Specialty Consult](#)
- [SECO Triage](#)
- [SECO Specialty Consult](#)

[More](#)

USA.gov

Figure 13.2

All the program referral case types will display at the top of the page (Figure 13.3).

3. Select the applicable case referral type.

If at any point the call turns into an emergency situation create a [Crisis Call](#) record.

Select **Non-Medical** to conduct an assessment on the participant and refer them to a Military and Family Life Counselor (MFLC) or a counselor within the MOS Network, or to another agency if you determine the participant to be outside the scope of non-medical counseling. See [Financial Counseling](#)

1. Select Financial.

Select **Financial** to select a referral type and enter in counseling information.

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 Language

Handoff Notes

Urgent

Cancel Save Done

Figure 14.1

First, select all the Referral Options that apply. Next, use the drop down menu to select Counseling Delivery.

If the participant does not wish to be contacted for follow-up, please check the box next to “Participant prefers not to be contacted for follow-up.”

Next, fill in the Counseling information including the Company name, Counselor name, Address, Phone number, and email address.

Finally, select the Handoff Type and Assign to a particular case manager (if applicable).

Indicate if an interpreter was required in order to create the referral for the participant and select their language. Select the Urgent checkbox if the case came in during non-business hours. Then, click Done to close the referral.

Non-Medical Counseling for additional assistance with the Non-Medical Counseling Referral form.

Select **Info & Referrals** if the participant is requesting information that will require additional research or time that is not directly related to any of the other programs (such as assistance with child care or non-bulk fulfillment requests).

Select **Specialty** to refer the participant to a Specialty Consultant for assistance regarding special needs, elder care, education, adult disability, adoption, work life, or bulk fulfillment.

While entering the referral information, click the **Save** button to save the referral at any point, or click the **Done** button to save and close the referral.

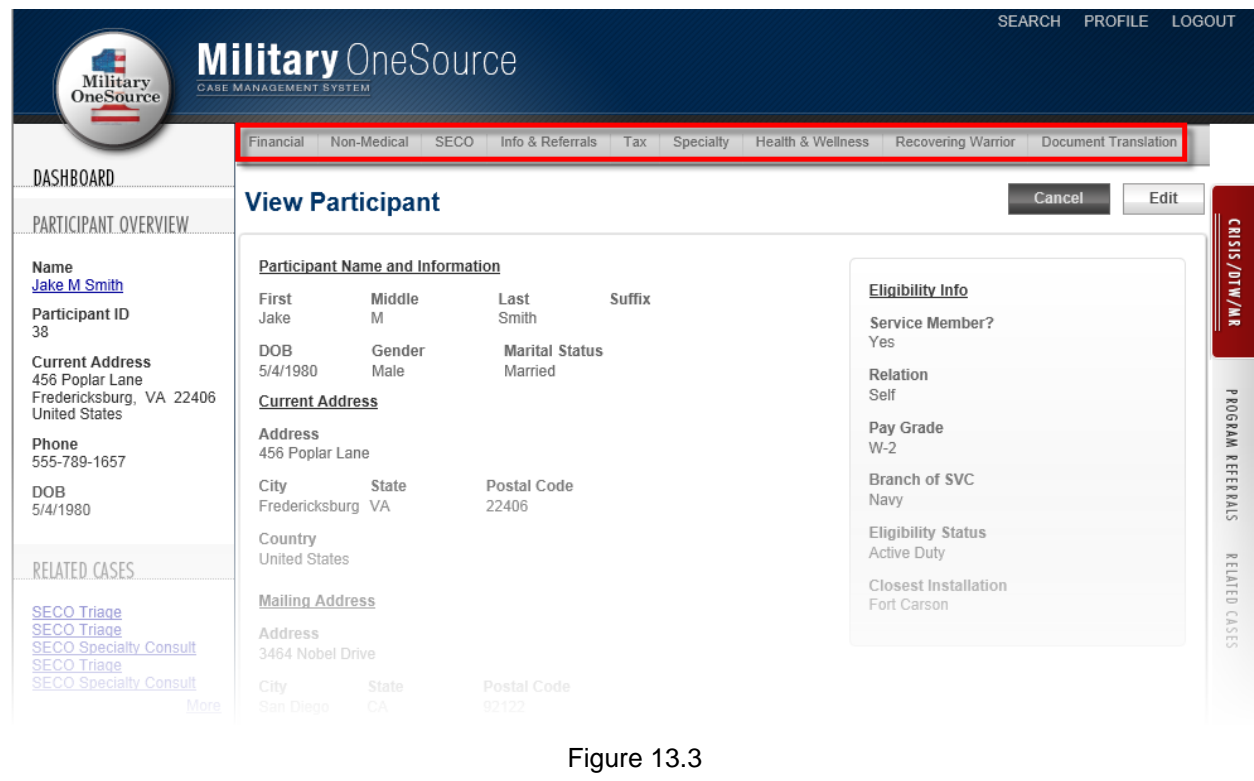


Figure 13.3

2. Enter information about the nature of the referral. (Not applicable for referrals to SECO)

The process for entering referral information will be similar across most of the case referral types, but they

all will collect different information specific to their type. Non-Medical Counseling and Document Translation requires additional information compared to the other case types, so refer to the [Financial Counseling](#)

3. Select Financial.

Select **Financial** to select a referral type and enter in counseling information.

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 Language

Handoff Notes Urgent

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

Figure 14.1

First, select all the Referral Options that apply. Next, use the drop down menu to select Counseling

Delivery.

If the participant does not wish to be contacted for follow-up, please check the box next to “Participant prefers not to be contacted for follow-up.”

Next, fill in the Counseling information including the Company name, Counselor name, Address, Phone number, and email address.

Finally, select the Handoff Type and Assign to a particular case manager (if applicable).

Indicate if an interpreter was required in order to create the referral for the participant and select their language. Select the Urgent checkbox if the case came in during non-business hours. Then, click Done to close the referral.

Non-Medical Counseling and [Document Translation](#) sections for specific instructions with completing these referrals.

Begin by entering additional information regarding the participant’s referral in the fields provided.

Referrals to SECO will not require any additional information aside from the handoff fields—skip to [step 5 below](#).

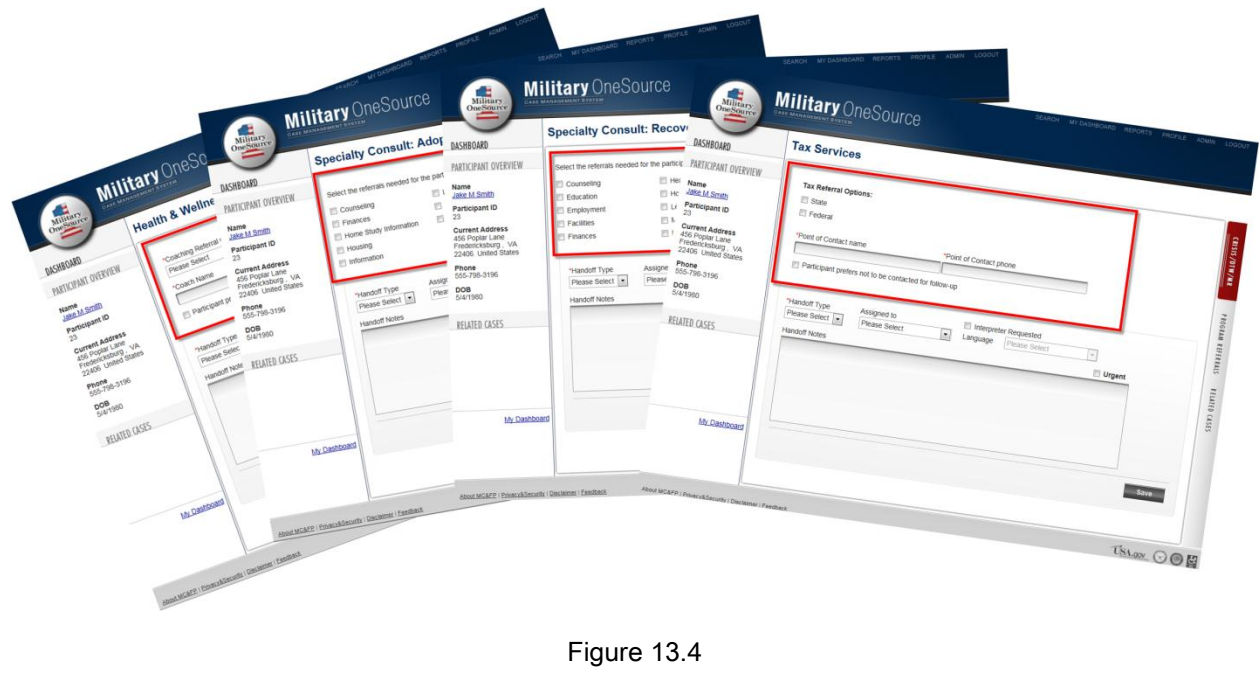


Figure 13.4

4. Indicate if the participant does not want a followed-up.

If the participant does not want to be followed up with by a case manager regarding their progress with a Health & Wellness, Financial Consulting, or Non-Medical Counseling case, select the checkbox.

The screenshot displays a web form for a participant's profile. On the left, there is a sidebar with the following information: Participant ID 23, Current Address (456 Poplar Lane, Fredericksburg, VA 22406, United States), Phone (555-798-3196), and DOB (5/4/1980). Below this is a 'RELATED CASES' section and a 'My Dashboard' link. The main form area includes a 'Federal' checkbox, two input fields for '*Point of Contact name' and '*Point of Contact phone', and a checkbox labeled 'Participant prefers not to be contacted for follow-up' which is highlighted with a red border. Below these are dropdown menus for '*Handoff Type' (set to 'Please Select'), 'Assigned to' (set to 'Please Select'), and 'Language' (set to 'Please Select'). There is also an 'Interpreter Requested' checkbox and an 'Urgent' checkbox. A large text area for 'Handoff Notes' is present, along with 'Cancel', 'Save', and 'Done' buttons at the bottom right. The footer contains 'About MG&FP | Privacy&Security | Disclaimer | Feedback' and 'USA.gov' logos.

Figure 13.5

5. Enter Handoff details.

Then, enter information about the handoff. The Handoff and Assigned to fields will not display for all referral types (Figure 13.6).

If you performed a warm handoff between the receiving case manager and the participant, select 'Warm Handoff' from the **Handoff Type** and then select the name of the case manager in the **Assigned to** list. Otherwise, select 'Left Voicemail'. If you would prefer a supervisor to assign the case to one of the case managers leave the **Assigned to** field set to 'Please Select'. The referral will appear in the supervisor's queue for them to delegate to their team (Figure 13.6).

Enter details about the handoff in the Handoff Notes textbox.

23

Current Address
456 Poplar Lane
Fredericksburg, VA
22406 United States

Phone
555-798-3196

DOB
5/4/1980

RELATED CASES

[My Dashboard](#)

*Point of Contact name *Point of Contact phone

Participant prefers not to be contacted for follow-up

*Handoff Type Assigned to
Please Select Please Select

Interpreter Requested
Language Please Select

Handoff Notes Urgent

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

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Figure 13.6

6. Indicate if an interpreter was required for the referral.

If interpretation assistance was needed in order to conduct this referral, select the **Interpreter Requested** checkbox (Figure 13.7). Then, select the participant's native language from the **Language** list.

23

Current Address
456 Poplar Lane
Fredericksburg, VA
22406 United States

Phone
555-798-3196

DOB
5/4/1980

RELATED CASES

[My Dashboard](#)

*Point of Contact name *Point of Contact phone

Participant prefers not to be contacted for follow-up

*Handoff Type Assigned to
Please Select Please Select

Interpreter Requested
Language Please Select

Handoff Notes Urgent

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

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Figure 13.7

7. Select the Urgent box if applicable.

Selecting the Urgent checkbox will display the case as a high priority in the case manager's queue.

Only referrals that come in during non-business hours should be flagged as Urgent.

These referrals will display in the Unassigned Cases queue for case manager's to see and delegate.

The screenshot shows the 'Add Referral' form in the Military OneSource CMS. The 'Urgent' checkbox is highlighted with a red box. The form includes the following fields and options:

- *Point of Contact name
- *Point of Contact phone
- Participant prefers not to be contacted for follow-up
- *Handoff Type: Please Select
- Assigned to: Please Select
- Interpreter Requested:
- Language: Please Select
- Handoff Notes: (Empty text area)
- Urgent (highlighted)
- Buttons: Cancel, Save, Done

Figure 13.8

8. Click Done.

Once the referral is saved it will display in the Current Referrals section in the Dashboard along the left-hand side of the page (Figure 13.9). To make any corrections click on the referral's link.

If you need to create additional referrals for the participant repeat steps 2 through 8 as needed. Each additional referral (up to five) will display in the Current Referrals section.

The screenshot shows the 'View Participant' dashboard in the Military OneSource CMS. The 'CURRENT REFERRALS' section is highlighted with a red box, showing a referral for 'Adoption'. The dashboard includes the following information:

- Participant Name and Information:**
 - Name: Jake M Smith
 - Participant ID: 23
 - Current Address: 456 Poplar Lane, Fredericksburg, VA 22406, United States
 - Phone: 555-798-3196
 - DOB: 5/4/1980
- Eligibility Info:**
 - Relation: Self
 - Branch of SVC: Air Force
 - Pay Grade: W-2
 - Eligibility Status: Active Duty
 - Closest Installation: Fort Carson
- Current Address:**
 - Address: 456 Poplar Lane
 - City: Fredericksburg, VA
 - State: VA
 - Zip: 22406
 - Country: United States
- Mailing Address:**
 - Address: 3464 Nobel Drive
 - City: San Diego, CA
 - State: CA
 - Zip: 92122
 - Country: United States
- Telephone:**
 - Home Phone: 555-798-3196
 - Work Phone:
 - Cell Phone:
- Email:**
 - Email Address: jakesmith@email.com
- Additional Information:**
 - Gender: Male
 - Marital Status: Married
 - Requires Interpreter: No
 - Service Member?: Yes
 - Referred By: Event

Figure 13.9

9. Click Done.

At the end of the phone call after all case referrals have been saved for the participant, click the **Done** button on the View Participant screen (Figure 13.10).

The referrals will be sent to the applicable case manager or to the supervisors to assign.

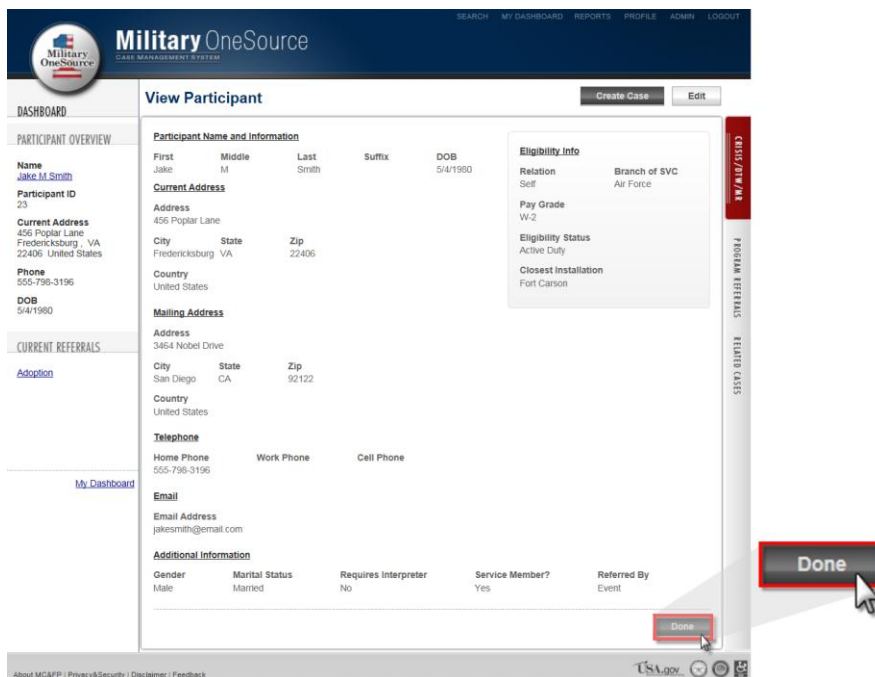


Figure 13.10

Financial Counseling

10. Select Financial.

Select **Financial** to select a referral type and enter in counseling information.

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
Language

Handoff Notes Urgent

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

Figure 14.1

First, select all the Referral Options that apply. Next, use the drop down menu to select Counseling Delivery.

If the participant does not wish to be contacted for follow-up, please check the box next to “Participant prefers not to be contacted for follow-up.”

Next, fill in the Counseling information including the Company name, Counselor name, Address, Phone

number, and email address.

Finally, select the Handoff Type and Assign to a particular case manager (if applicable).

Indicate if an interpreter was required in order to create the referral for the participant and select their language. Select the Urgent checkbox if the case came in during non-business hours. Then, click Done to close the referral.

Non-Medical Counseling

1. Select Non-Medical.

Select **Non-Medical** to conduct an assessment on the participant and refer them to a Military and Family Life Counselor (MFLC) or a counselor within the MOS Network, or to another agency if they are determined to be out of scope for non-medical counseling.

The screenshot shows the Military OneSource Case Management System interface. The top navigation bar includes 'SEARCH', 'PROFILE', and 'LOGOUT'. The main navigation menu has tabs for 'Financial', 'Non-Medical' (highlighted with a red box), 'SECO', 'Info & Referrals', 'Tax', 'Specialty', 'Health & Wellness', 'Recovering Warrior', and 'Document Translation'. The left sidebar contains 'DASHBOARD' and 'PARTICIPANT OVERVIEW'. The main content area is titled 'View Participant' and includes 'Cancel' and 'Edit' buttons. The participant information is as follows:

Participant Name and Information			
First	Middle	Last	Suffix
Jake	M	Smith	
DOB	Gender	Marital Status	
5/4/1980	Male	Married	
Current Address			
Address			
456 Poplar Lane			
City	State	Zip	
Fredericksburg	VA	22406	
Country			
United States			

Eligibility Info:

- Service Member? Yes
- Relation Self
- Pay Grade W-2
- Branch of SVC Air Force
- Eligibility Status Active Duty

On the right side of the page, there is a vertical red button labeled 'CRISIS /DTW/WR' and a vertical grey button labeled 'PROGRAM REFERRALS'.

Figure 15.1

The Non-Medical Counseling referral assessment screen will display.

Military OneSource
CASE 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
Please Select

Language
 Interpreter Requested
Please Select

Referral Assessment

Select all that apply:

Participant's Risk to Self
 Participant's Risk to Other
 Currently Receiving Mental Health Treatment
 Currently Prescribed Psychoactive Medication
 Diagnosed with Mental Condition

Recurring Psychiatric Hospitalizations
 Fitness for Duty or Court Ordered Evaluation
 Domestic Abuse
 Child Abuse
 Sexual Assault/Rape

Substance Abuse
 Illegal Activity

Scope Determination
Please Select Cleared by FAP

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

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CRISIS /OTW/MR
PROGRAM REFERRALS
RELATED CASES

Figure 15.2

2. Read the Limits of Confidentiality text to the participant, and then select the checkbox (Figure 15.3).

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:

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

Scope Determination:

Cleared by FAP

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

CRISIS / DTW / AR
PROGRAM REFERRALS
RELATED CASES

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Figure 15.3

3. Select the Presenting Problem.

- a. If an interpreter is required, select the Interpreter Requested checkbox and select a Language from the drop down menu.

The screenshot shows the Military OneSource interface for 'Non-Medical Counseling'. The top navigation bar includes 'SEARCH', 'PROFILE', and 'LOGOUT'. The left sidebar contains 'DASHBOARD', 'PARTICIPANT OVERVIEW', and 'RELATED CASES'. The participant overview section lists details for Jake Smith, including his ID (23), address (456 Poplar Lane, Fredericksburg, VA 22406), phone (555-789-1658), and DOB (5/4/1980). The main content area is titled 'Non-Medical Counseling' and contains a disclaimer about confidentiality. Below this is a section for 'Limits of Confidentiality Explained' with an unchecked checkbox. The 'Presenting Problem' dropdown menu and the 'Language' dropdown menu are both highlighted with red boxes. The 'Language' dropdown includes an unchecked checkbox for 'Interpreter Requested'. The 'Referral Assessment' section asks to 'Select all that apply' and lists various conditions with unchecked checkboxes, such as 'Participant's Risk to Self', 'Recurring Psychiatric Hospitalizations', 'Substance Abuse', 'Participant's Risk to Other', 'Fitness for Duty or Court Ordered Evaluation', 'Illegal Activity', 'Currently Receiving Mental Health Treatment', 'Domestic Abuse', 'Currently Prescribed Psychoactive Medication', 'Child Abuse', and 'Diagnosed with Mental Condition'. A 'Scope Determination' dropdown is also present with an unchecked checkbox for 'Cleared by FAP'. At the bottom right, there are 'Cancel', 'Save', and 'Done' buttons. The footer contains links for 'About MC&FP', 'Privacy&Security', 'Disclaimer', and 'Feedback', along with the USA.gov logo and other icons.

Figure 15.4

4. Assess the participant and select the applicable issue(s) (if any).

Military OneSource
CASE 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:

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

Scope Determination: Cleared by FAP

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

CRISIS /DTW/R PROGRAM REFERRALS RELATED CASES

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Figure 15.5

- Determine if the referral is In Scope for Non-Medical Counseling or Outside Scope for Non-Medical Counseling. Select the checkbox if the participant was cleared by FAP.
- Follow the steps below according to the scope determination selected.

SEARCH PROFILE LOGOUT

Military OneSource
CASE MANAGEMENT SYSTEM

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:

Participant's Risk to Self
 Participant's Risk to Other
 Currently Receiving Mental Health Treatment
 Currently Prescribed Psychoactive Medication
 Diagnosed with Mental Condition

Recurring Psychiatric Hospitalizations
 Fitness for Duty or Court Ordered Evaluation
 Domestic Abuse
 Child Abuse
 Sexual Assault/Rape

Substance Abuse
 Illegal Activity

Scope Determination:
 Cleared by FAP

In Scope for Non-Medical Counseling
Outside Scope for Non-Medical Counseling

[Cancel](#)

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Figure 15.6

7. If the participant is outside scope for non-medical counseling:

Select any agencies that you refer the participant to. Then, indicate whether the participant has insurance, if they declined the referral, or if they terminated the call. Click **Done** to complete the referral (Figure 15.7).

Referrals

Select all that apply:

- Child Protective Services
- Community Service
- Family Advocacy
- Judge Advocate General
- Local Hospital
- MTF

Handoff Type

Please Select

- Participant has insurance
- Participant declined referral
- Participant terminated call

Handoff Notes

Urgent

Cancel Save Done

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Figure 15.7

8. If the participant is within scope for non-medical counseling:

If the referral is In Scope for Non-Medical Counseling, Research Study questions will be displayed.

*Scope Determination

In Scope for Non-Medical Counseling

Cleared by FAP

Participant agrees to participate in research study

*RAND Study

Yes No

*RAND Phase II Study

Yes No

Figure 15.8

If the referral is In Scope for Non-Medical Counseling, select the **Counseling Preference** and **Type of Counseling** (Figure 15.8).

If the participant is interested in in-person counseling select the checkbox if they are within 40 miles of an MFLC installation. If they are within 40 miles of an MFLC installation, select the checkbox if they accept MFLC services. Then, select the applicable **Referral Type**—MFLC, or MOS Network.

If you are not sure whether or not they are within 40 miles of an MFLC installation, select MFLC as the Referral Type and then follow the MFLC instructions below to search for installations. You can change the Referral Type and unselect the checkboxes if a nearby installation isn't found.

*Scope Determination
In Scope for Non-Medical Counseling Cleared by FAP

Participant agrees to participate in research study

*Non-Medical Study
 Yes No

*RAND Phase II Study
 Yes No

*RAND Study
 Yes No

*RAND Study test
 Yes No

*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

*Handoff Type

Handoff Notes Urgent

Figure 15.8

a. If the referral is for MFLC:

Select the **Open MFLC**

Locator link to search for MFLC installations near the participant.

The MFLC Locator search screen will open in a new window.

Figure 15.9

Enter the participant's postal code and click **Search** to see all installations that are within 40 miles. Or, select the participant's state, country, or the installation at which they are located to see which MFLC locations are nearby (if any).

Location	Address	Postal Code	Phone	Primary Category	Installation	Select
Charlottesville Center	456 Main Street Charlottesville, VA, United States	22902	555-100-0000	MFLC	Camp Parks	+
ACS	123 ABC Road Charlottesville, VA, United States	22311	125-545-0099	MFLC	Fort Rucker	+
ACS	123 ABC Road Charlottesville, VA, United States	22311	125-545-0099	MFLC	Fort Rucker	+
Marine Corps Center	3089 Roan Street Quantico, VA, United States	22134	724-238-6666	MFLC		+
Financial Assistance	350 Hall Street Charlottesville, VA, United States	15906	814-555-5555	MFLC		+

Figure 15.10

If multiple MFLC locations are found, choose one that has a Primary Category specialization applicable to the participant's issue. Choose a second MFLC location as a backup if desired.

Then, in the referral form select the **MFLC Category** for the participant's issue. Click the + icon next to each POC to select a search result for the first and second (if applicable) MFLC locations you choose from the MFLC Locator (Figure 15.11). If the MFLC Location isn't at an installation leave the field blank. Finally, click the **Done** button to close the referral (figure 15.11).

The screenshot shows a web form for MFLC referrals. At the top, there's a 'Scope Determination' section with a dropdown menu set to 'In Scope for Non-Medical Counseling' and a checkbox for 'Cleared by FAP'. Below that is a section for counseling preferences, including a dropdown for 'Counseling Preference', checkboxes for 'Participant is within 40 miles of MFLC installation' and 'Participant accepts MFLC services', and radio buttons for 'Type of Counseling Requested' (Individual, Couple, Family). A 'Referral Type' dropdown is set to 'MFLC'. The 'MFLC Info' section, highlighted with a red box, contains a dropdown for 'MFLC Category', and two pairs of input fields for 'POC Phone' and 'POC Installation Name', each with a '+' icon next to the installation name field. Below this is a 'Handoff Type' dropdown and a 'Handoff Notes' text area with an 'Urgent' checkbox. At the bottom right, there are 'Cancel', 'Save', and 'Done' buttons, with the 'Done' button highlighted by a red box. The footer includes links for 'About MC&FP', 'Privacy&Security', 'Disclaimer', and 'Feedback', along with the USA.gov logo and accessibility icons.

Figure 15.11

b. If the Referral Type is for the MOS Network (Figure 15.12):

If the **Referral Type** is MOS Network, enter the participant's reason for requesting counseling. Enter the provider's name, phone number, location, and authorization number. Select the checkbox if the participant does not want to be contacted at a later date to check on their status for non-medical counseling.

If you would like to schedule a follow-up reminder for the specialty consultant that will be overseeing the progress of the case, enter the due date and a small note. The follow up will be

sent to the responsible people within the system.

Finally, enter the Handoff Type and Notes and click the **Done** button to close the referral form.

The screenshot shows a web form for MOS Network referrals. At the top, there are radio buttons for 'Type of Counseling Requested' (Individual, Couple, Family) and a checkbox for 'Participant accepts MFLD services'. Below that is a 'Referral Type' dropdown menu set to 'MOS Network'. The main section, titled 'MOS Network', contains several required fields: '*Reason Requesting Counseling', '*Authorization Number', '*Provider Name', 'Phone', and '*Location'. There is also a checkbox for 'Participant prefers not to be contacted for follow-up', a 'Follow Up Date' field with a calendar icon, and a 'Follow Up Reason' field with a 'Clear' button. Below this is a 'Handoff Type' dropdown menu set to 'Please Select' and a 'Handoff Notes' text area with an 'Urgent' checkbox. At the bottom right, there are three buttons: 'Cancel', 'Save', and 'Done'. The 'Done' button is highlighted with a red box. The footer includes a 'Disclaimer | Feedback' link, the USA.gov logo, and accessibility icons.

Figure 15.12

SECO

1. Select SECO

Enter the Handoff Type and Notes and click the Done button to close the referral form (Figure 16.1).

SECO Triage

*Handoff Type: Please Select

Assigned to: Please Select

Interpreter Requested

Language: Please Select

Handoff Notes: Urgent

Buttons: Cancel, Save, Done

Figure 16.1

Information and Referrals

1. Select Information and Referrals

Check the boxes next to the appropriate referrals. Enter the Handoff Type and Notes and click the Done button to close the referral form (Figure 17.1).

Military OneSource
CARE MANAGEMENT SYSTEM

SEARCH MY DASHBOARD REPORTS PROFILE ADMIN LOGOUT

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 Exemptions
<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: Rental Income
<input type="checkbox"/> Financial Grant Information	<input type="checkbox"/> YMCA Enrollment	<input type="checkbox"/> Tax: Interest and Dividends	<input type="checkbox"/> Tax: Retirement Savings Contribution Credit
<input type="checkbox"/> Disaster Recovery	<input type="checkbox"/> Other	<input type="checkbox"/> Tax: IRA	<input type="checkbox"/> Tax: Small Business
<input type="checkbox"/> Fulfillment	<input type="checkbox"/> Tax: Alimony	<input type="checkbox"/> Tax: Itemized Deductions	<input type="checkbox"/> Tax: State Specific Forms
<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"/> Tax: Tax Software Issues (Vendor)
<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	

CRISIS /DTW/IR PROGRAM REFERRALS RELAT

Figure 17.1

Tax

1. Select Tax

Select the Tax Referral option and enter in a point of contact name and phone number. Next, enter the Handoff Type and Notes and click the Done button to close the referral form (Figure 18.1).

The screenshot shows the Military OneSource Case Management System interface. The top navigation bar includes links for SEARCH, MY DASHBOARD, REPORTS, PROFILE, ADMIN, and LOGOUT. The main header features the Military OneSource logo and the text 'CASE MANAGEMENT SYSTEM'. On the left, a sidebar contains navigation options: DASHBOARD, PARTICIPANT OVERVIEW (with sub-links for Name: Josh Jacobs, Participant ID: 12, Current Address, Phone: 814-200-2000, and DOB: 5/16/1984), and RELATED CASES (with links for Bulk Fulfillment, SECO Specialty Consult, and More). The main content area is titled 'Tax Services' and contains the following fields and options:

- Tax Referral Options:**
 - State
 - Federal
- *Point of Contact name** and ***Point of Contact phone** (text input fields)
- Participant prefers not to be contacted for follow-up
- *Handoff Type** (dropdown menu, 'Please Select')
- Assigned to** (dropdown menu, 'Please Select')
- Interpreter Requested
- Language** (dropdown menu, 'Please Select')
- Handoff Notes** (text area)
- Urgent

At the bottom right of the form are buttons for [Cancel](#), **Save**, and **Done**.

Figure 18.1

Specialty

1. Select Specialty

After selecting Specialty, you are prompted to choose which type of specialty consult you would like to open. Your choices include Special Needs, Elder Care, Education, Adult Disability, Adoption, Work Life, and Bulk Fulfillment (Figure 19.1).

The process for entering specialty consult referral information will be similar across most of the specialty consult types, but they all will collect different information specific to their type.

After selecting your Specialty Consult type, check the boxes for referrals given. Enter the Handoff Type and Notes and click the Done button to close the referral form.

The screenshot shows the Military OneSource interface. At the top, there is a navigation bar with 'SEARCH', 'MY DASHBOARD', 'REPORTS', 'PROFILE', 'ADMIN', and 'LOGOUT'. Below this is a secondary navigation bar with tabs: 'Financial', 'Non-Medical', 'SECO', 'Info & Referrals', 'Tax', 'Specialty', 'Health & Wellness', 'Recovering Warrior', and 'Document Translation'. The 'Specialty' tab is active, and a red box highlights the 'Special Needs' sub-tab, along with 'Elder Care', 'Education', 'Adult Disability', 'Adoption', 'Work Life', and 'Bulk Fulfillment'. The main content area is titled 'View Participant' and contains a form for 'Participant Name and Information'. The form fields are as follows:

First	Middle	Last	Suffix
Josh		Jacobs	

DOB	Gender	Marital Status
5/16/1984	Male	Single

Current Address

Address	City	State	Postal Code	Country

Mailing Address

Address	City	State	Postal Code	Country

Telephone

Preferred Phone	Work Phone	Cell Phone
814-200-2000		

Email

Email Address
josh.jacobs@abc.com

Additional Information

Requires Interpreter	Referred By
No	

Buttons: 'Cancel', 'Edit', 'Void', 'Done'. A vertical sidebar on the right contains 'CRISIS /OTW/ME', 'PROGRAM REFERRALS', and 'RELATED CASES'.

Figure 19.1

Health and Wellness Coaching

1. Select Health and Wellness

Fill in Coaching Referral Option, Coaching Delivery, Coach Name, Phone and Email Address. Enter the Handoff Type and Notes and click the Done button to close the referral form (Figure 20.1).



Figure 20.1

Recovering Warrior

1. Select Recovering Warrior

Check the boxes for any referrals needed for the participant. Enter the Handoff Type and Notes and click the Done button to close the referral form. (Figure 21.1).



Figure 21.1

Document Translation

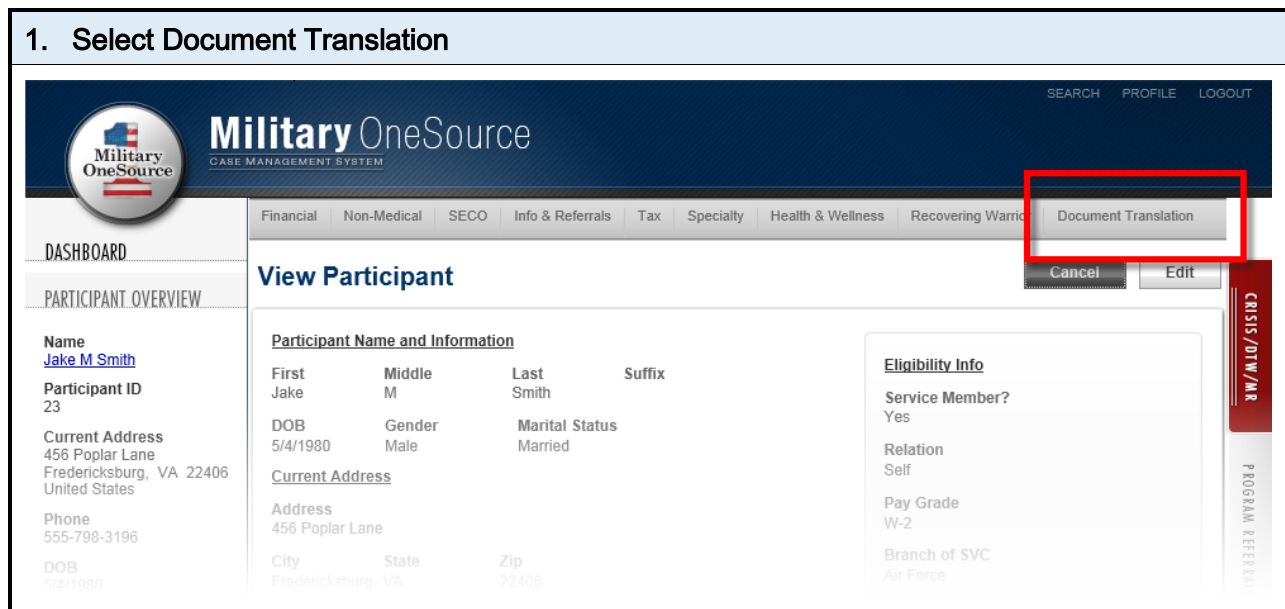


Figure 22.1

2. Enter information for the document to be translated.

The screenshot shows the 'Document Translation' interface in the Military OneSource CMS. The top navigation bar includes 'SEARCH', 'PROFILE', and 'LOGOUT'. The left sidebar displays the user's name 'Jake Smith', Participant ID '38', and contact information. The main content area is titled 'Document Translation' and contains a 'Documents' section. A red rectangular box highlights the top portion of this section, which includes the following fields: 'Document Type*' (dropdown), 'From Language*' (dropdown), 'No. of Pages*' (text input), 'Details of Other' (text input), and 'To Language*' (dropdown). Below these are two dropdown menus for 'Document will be delivered via:' and 'Document will be returned via:'. An 'Add Document' button is located to the right of the highlighted area. Further down, there are fields for '*Handoff Type', 'Assigned to', 'Interpreter Requested' (checkbox), and 'Language'. A 'Handoff Notes' text area and an 'Urgent' checkbox are also present. At the bottom of the form are 'Cancel', 'Save', and 'Done' buttons. The footer contains links for 'About MC&FP', 'Privacy&Security', 'Disclaimer', and 'Feedback', along with the USA.gov logo.

Figure 22.2

3. If more than one document needs to be translated, click the Add Document button and enter the details for the additional document. Repeat for each additional document to be translated.

The screenshot displays the 'Document Translation' page in the Military OneSource CMS. The top navigation bar includes 'SEARCH', 'PROFILE', and 'LOGOUT'. The left sidebar contains a 'DASHBOARD' and 'PARTICIPANT OVERVIEW' section for 'Jake Smith', listing his ID (38), current address (456 Poplar Lane, Fredericksburg, VA 22406), phone (555-789-1658), and DOB (5/4/1980). The main content area is titled 'Document Translation' and features a 'Documents' section. This section includes a form with the following fields: 'Document Type*' (Please Select), 'From Language*' (Please Select), 'No. of Pages*' (text input), 'Details of Other' (text input), and 'To Language*' (Please Select). Below these are 'Document will be delivered via:' and 'Document will be returned via:' (both Please Select). A red-bordered button labeled 'Add Document' is highlighted. The 'Handoff' section includes '*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. The footer contains links for 'About MC&FP', 'Privacy&Security', 'Disclaimer', and 'Feedback', along with USA.gov and other service logos.

Figure 22.3

4. Select the type of handoff and the person that the case will be assigned to. Enter additional notes about the handoff in the textbox.

The screenshot displays the Military OneSource Case Management System interface for a 'Document Translation' task. The top navigation bar includes 'SEARCH', 'PROFILE', and 'LOGOUT'. The sidebar on the left provides participant details for Jake Smith, including his name, ID (38), address (456 Poplar Lane, Fredericksburg, VA 22406), phone (555-789-1658), and DOB (5/4/1980). The main content area is titled 'Document Translation' and contains a 'Documents' section with various dropdown menus for 'Document Type*', 'From Language*', 'To Language*', and 'Details of Other'. Below this, there are fields for 'Document will be delivered via:' and 'Document will be returned via:'. A red rectangular box highlights the '*Handoff Type' and 'Assigned to' dropdown menus, which both currently show 'Please Select'. To the right of these are checkboxes for 'Interpreter Requested' and 'Urgent', and a 'Language' dropdown. At the bottom of the form are 'Cancel', 'Save', and 'Done' buttons. The footer contains links for 'About MC&FP', 'Privacy&Security', 'Disclaimer', and 'Feedback', along with the USA.gov logo.

Figure 22.4

5. Indicate if an interpreter was required in order to create the referral for the participant and select their language. Select the Urgent checkbox if the case manager should treat the case as a priority. Then, click Done to close the referral.

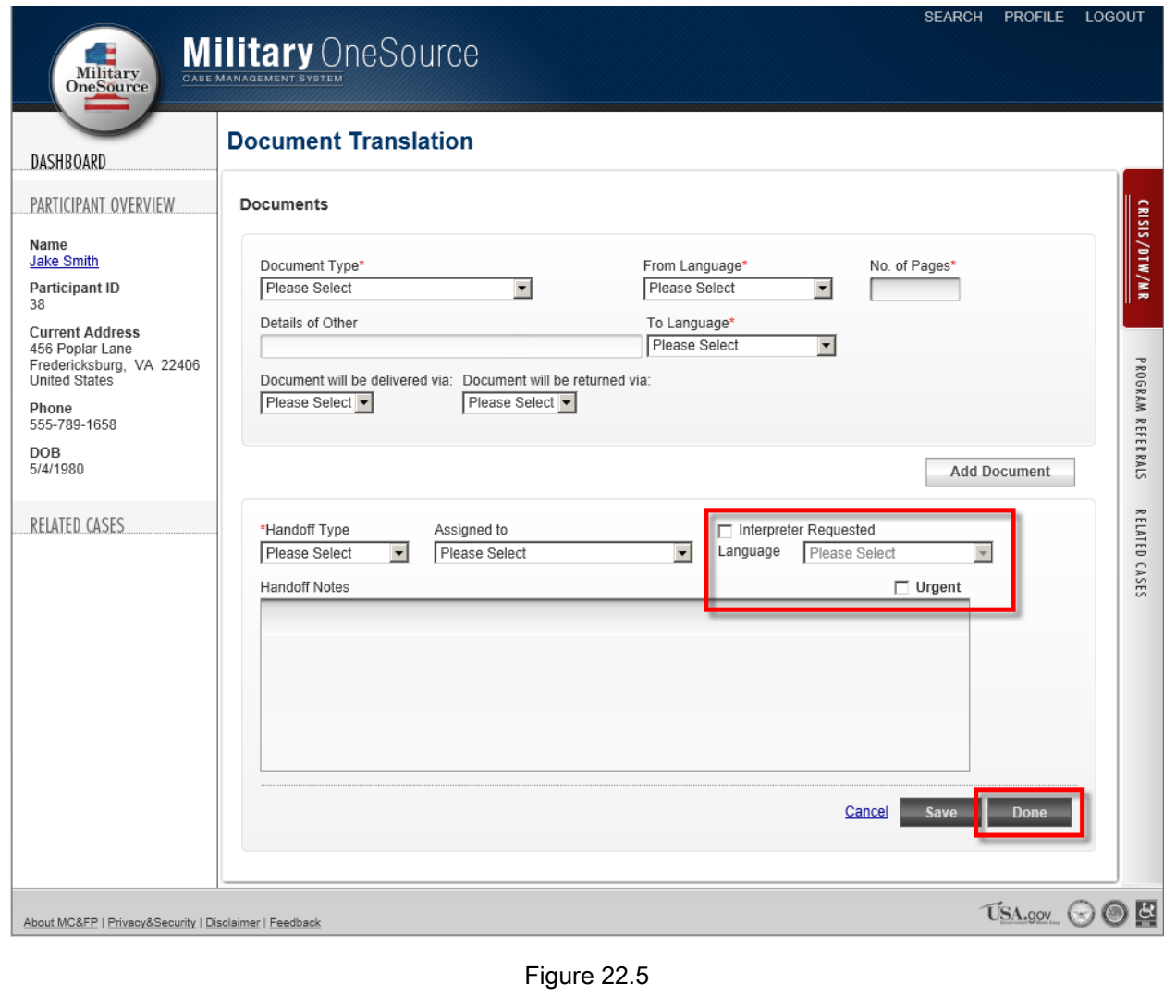


Figure 22.5

Adding a Contact Note to a Case

To add notes to a case for the case manager, such as if the participant were to call you after hours requesting information regarding their ongoing case, create a contact note by following these steps:

1. Open the participant's record.

Locate the participant on the search screen (see [Search for a Participant](#)) and click on their name to open their record.

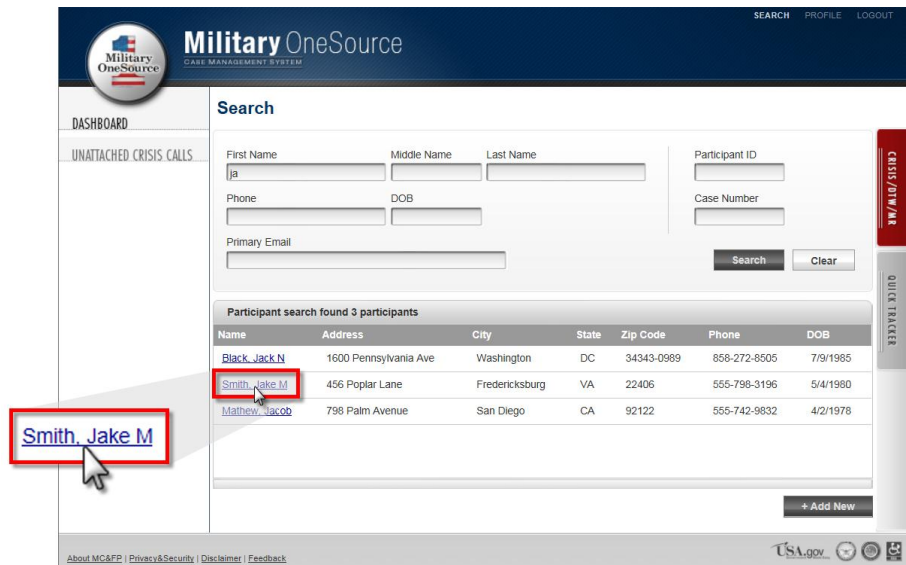


Figure 23.1

2. Click on the Related Cases tab.

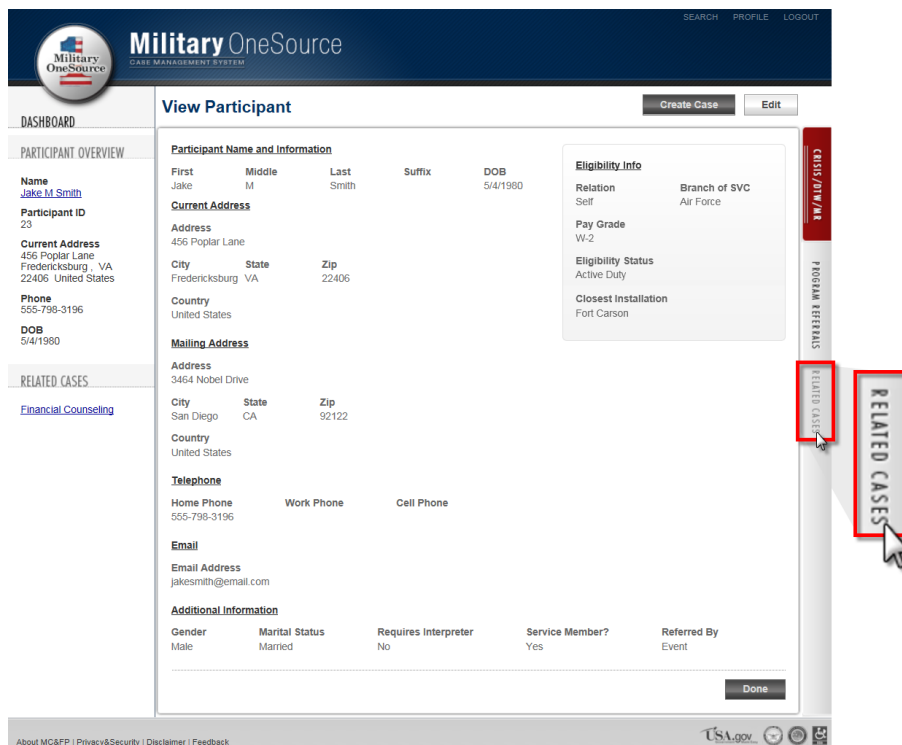


Figure 23.2

3. Select the applicable case.



Figure 23.3

4. Click on Add Contact Note

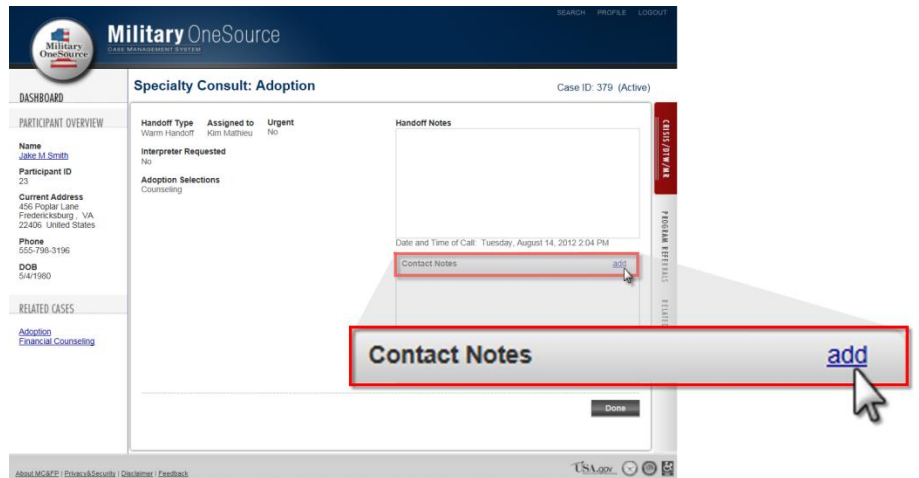


Figure 23.4

5. Enter the note's details and click Done

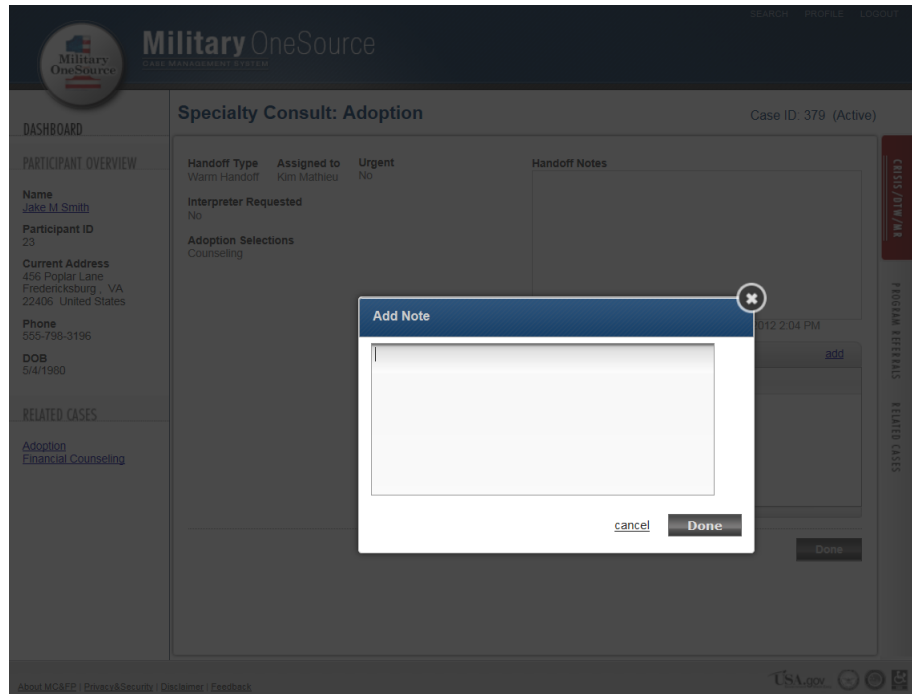


Figure 23.5

The note will be added to the Contact Notes section of the case for the case manager to read.

Your name and the date and time that you entered the note will automatically be added to the entry.

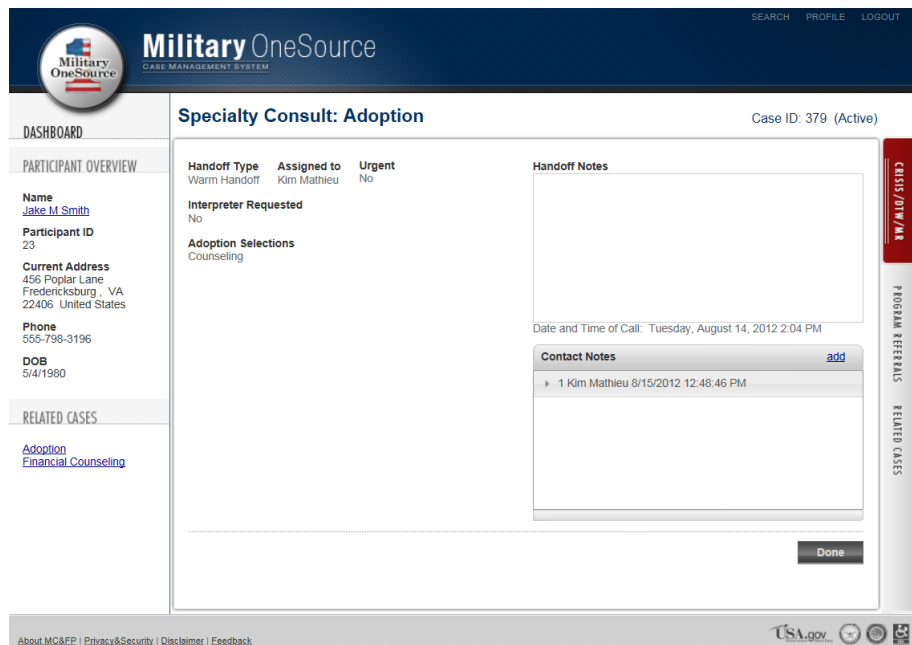


Figure 23.6