Military OneSource

CASE MANAGEMENT SYSTEM

Call Center User Guide

Contents

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.

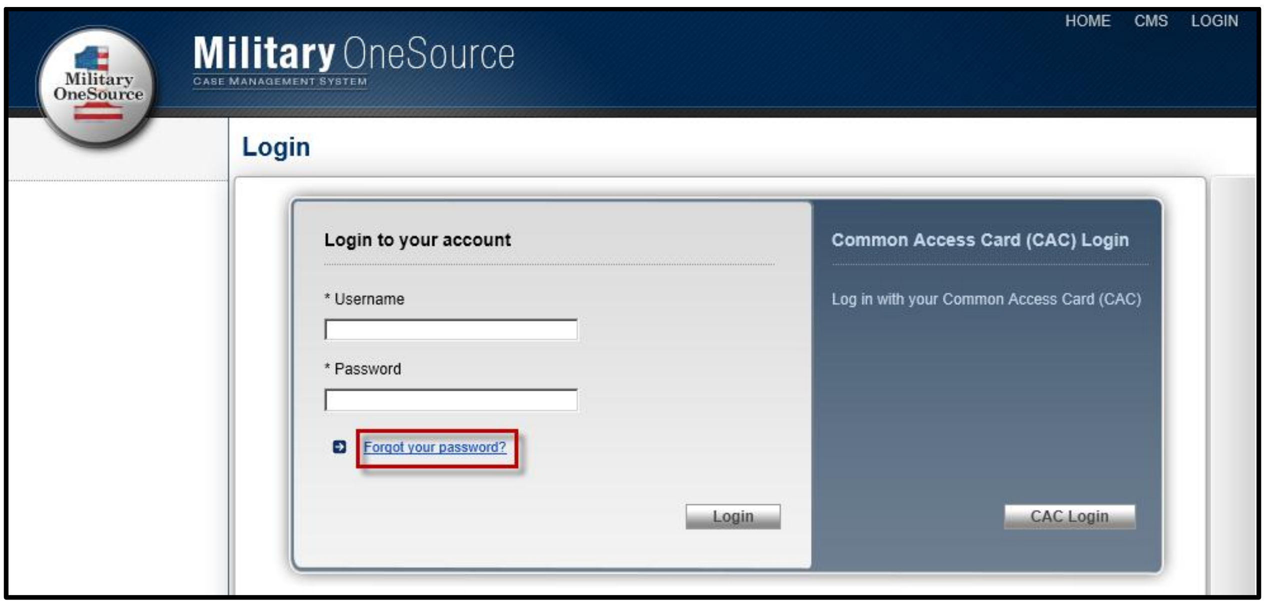


Figure 1.1

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).

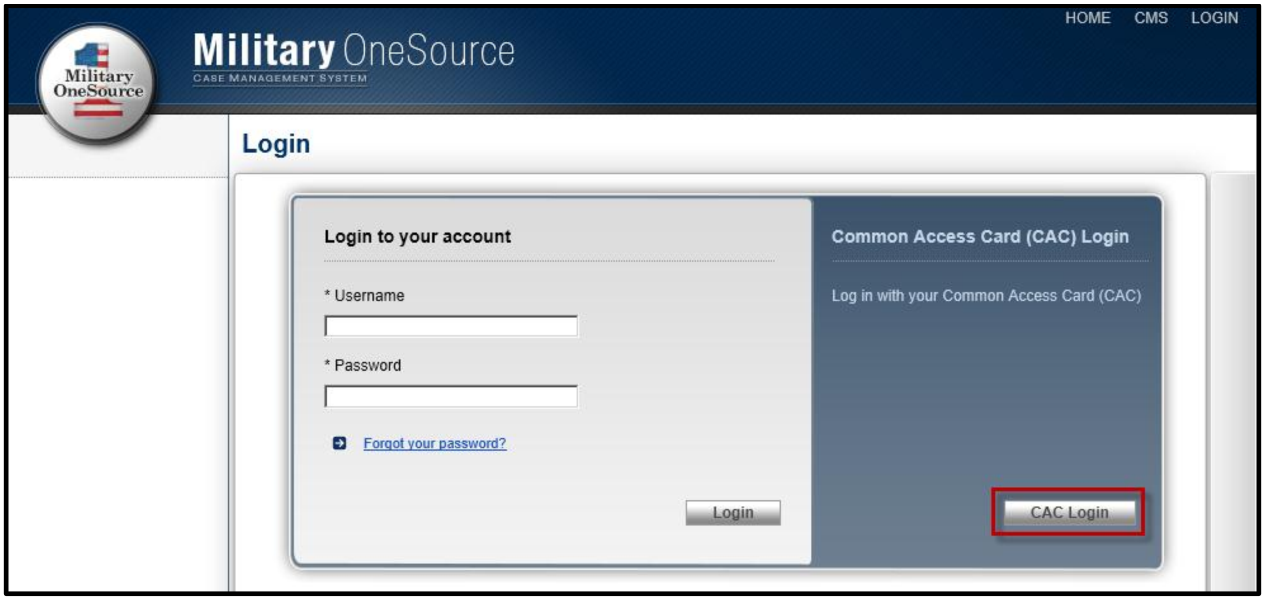


Figure 2.1

- 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).

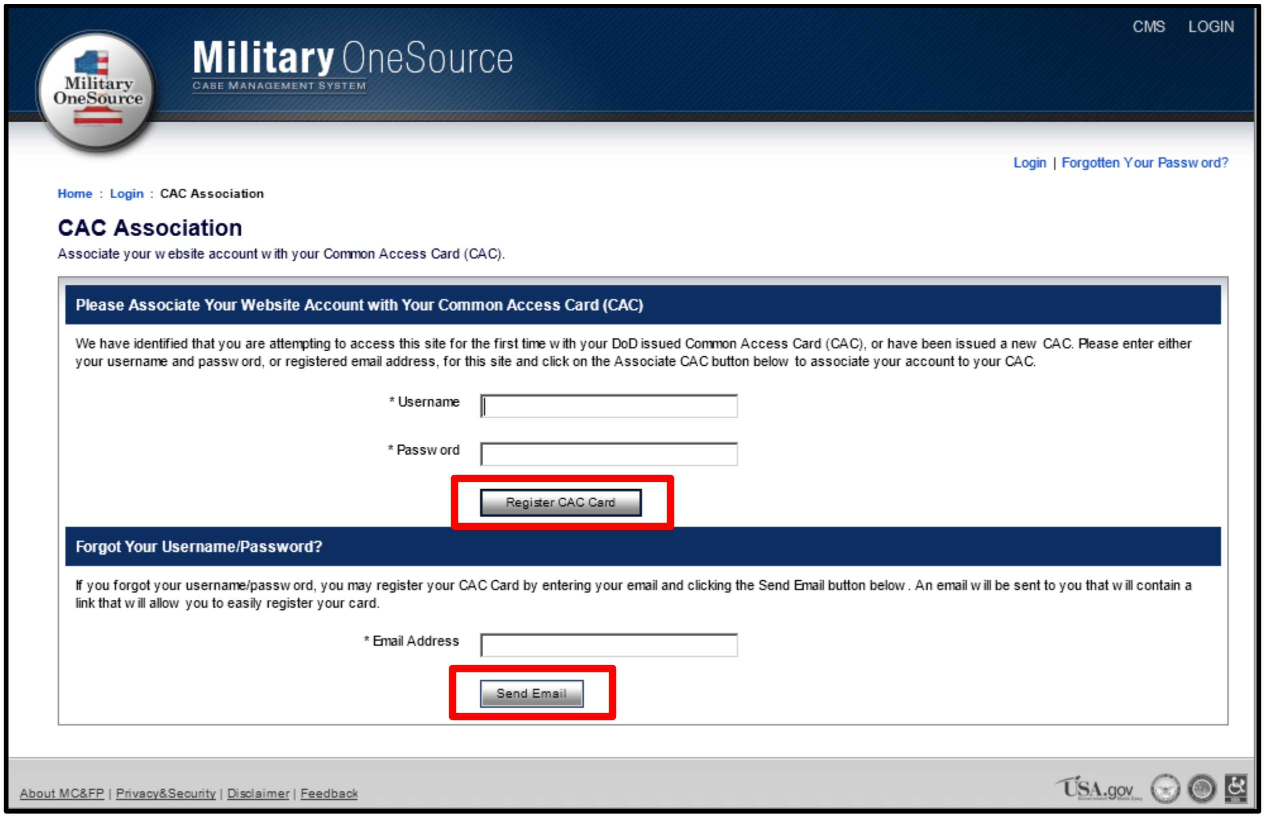


Figure 2.2

Updating Profile

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

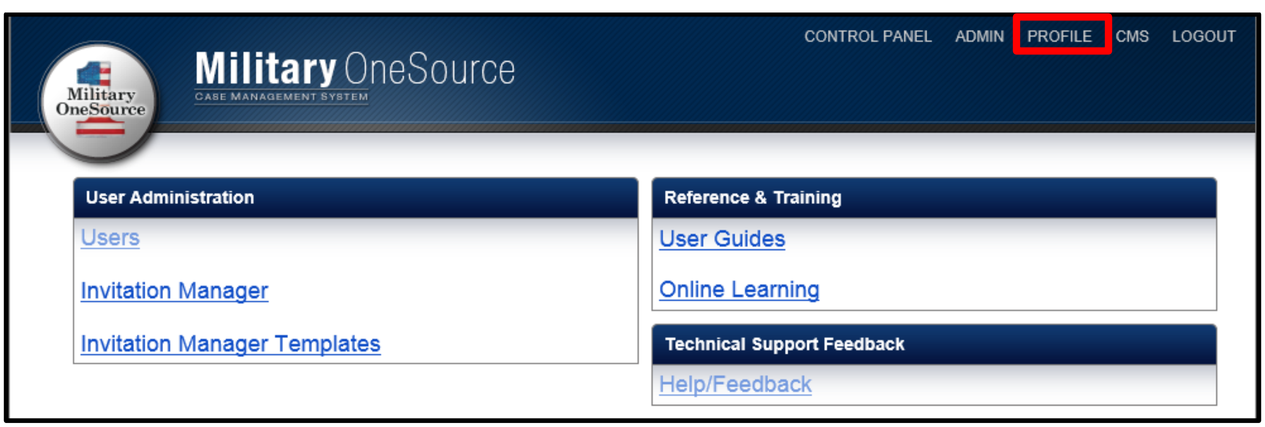


Figure 3.1

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

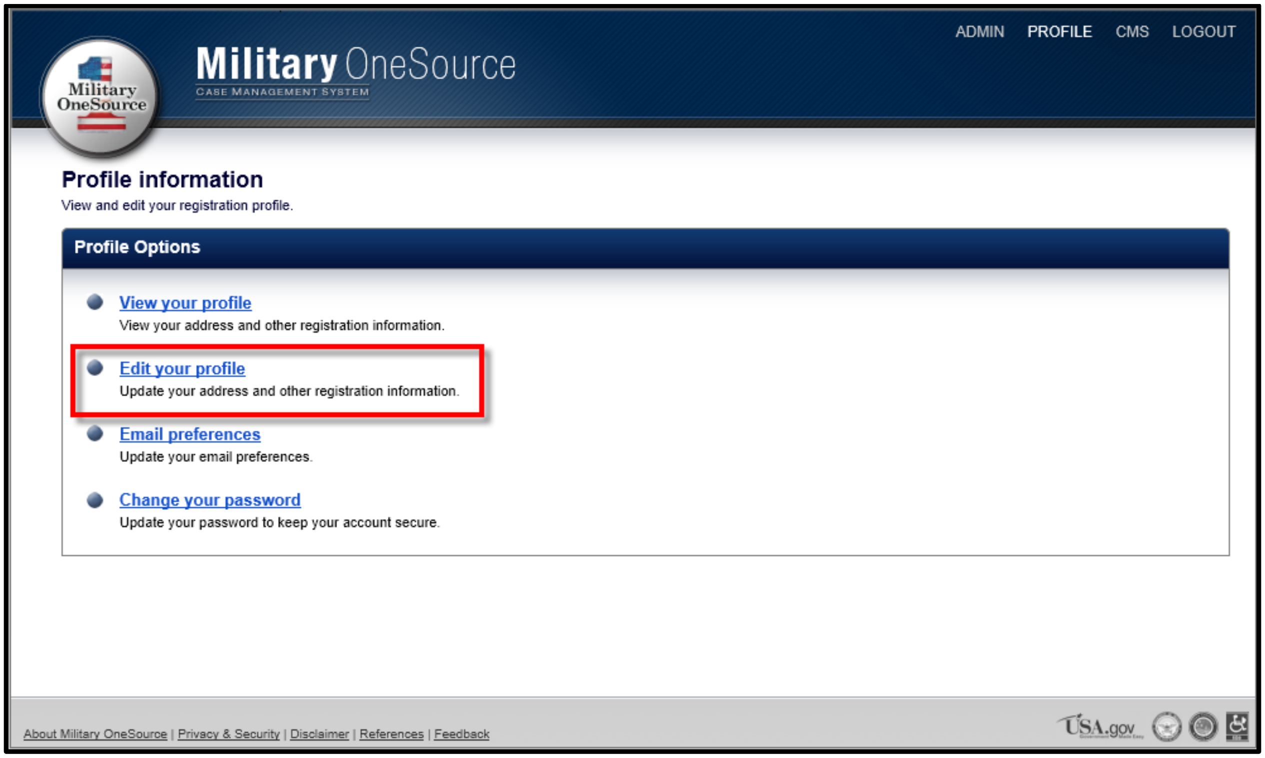


Figure 3.2

- 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
• Quick information requests such as directions for local fast food, contact information for base resources, or caller dialed the wrong number	• Quick Tracker
• Emergency calls—crises, duty to warn, mandated reports, or adverse incidents	• Crisis / Duty to Warn / Mandated Report
• 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	• Program Referrals

Purpose of call	Refer to
time (such as assistance with child care or non-bulk fulfillment requests).	
• Caller is following up regarding their pre-existing case	• 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.

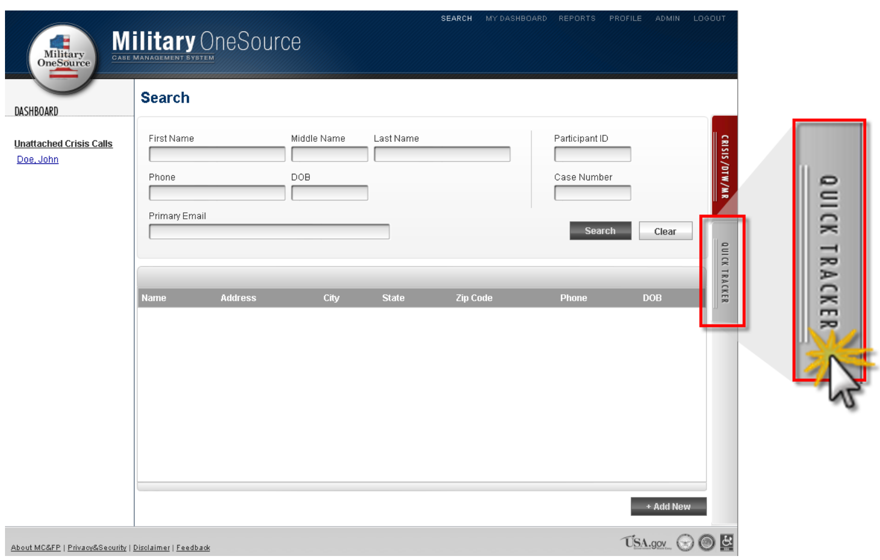


Figure 4.2

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.

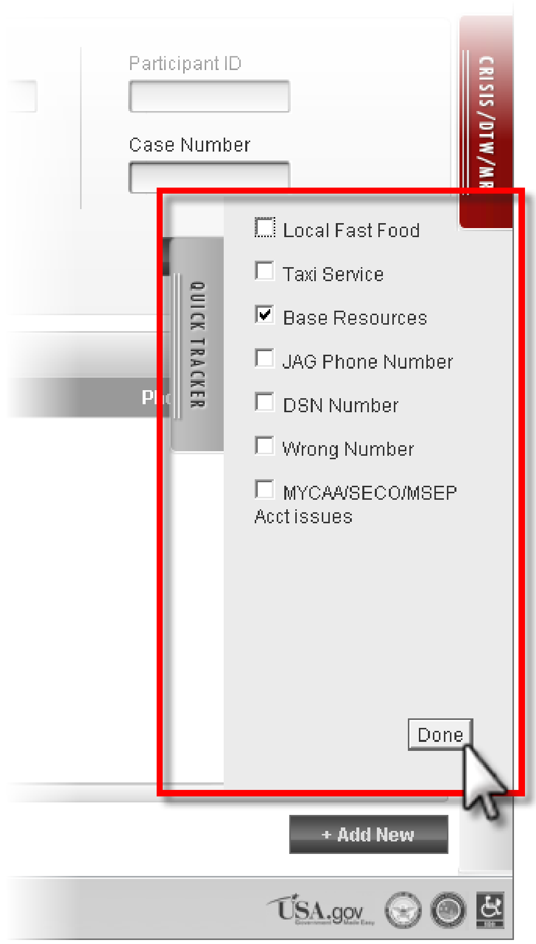


Figure 4.3

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.

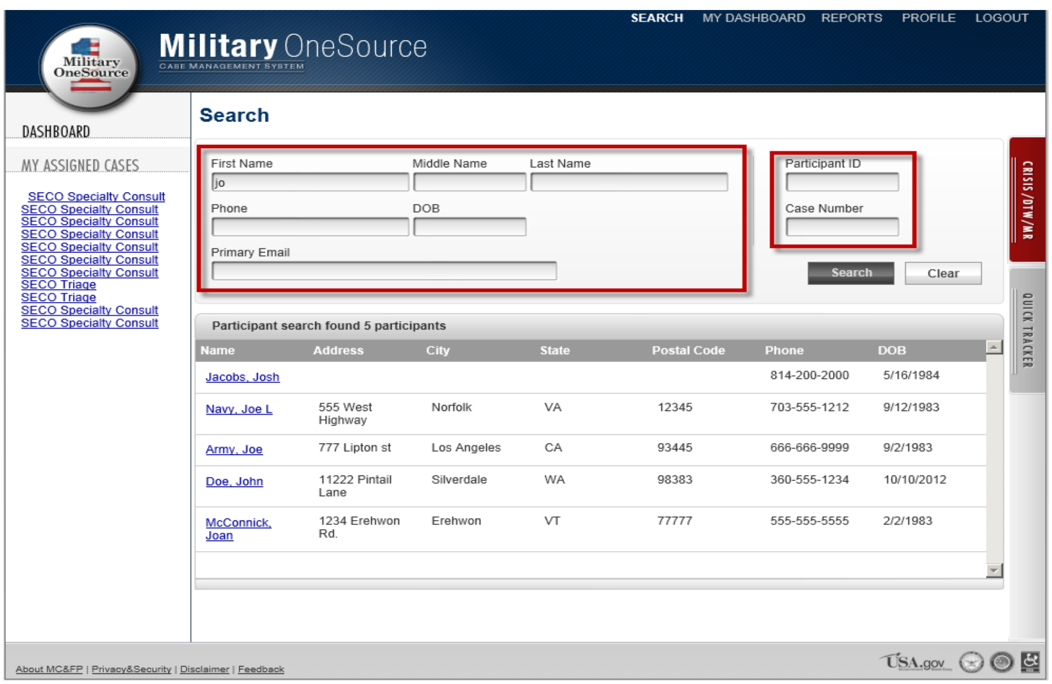


Figure 5.2

3. Select the participant.

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

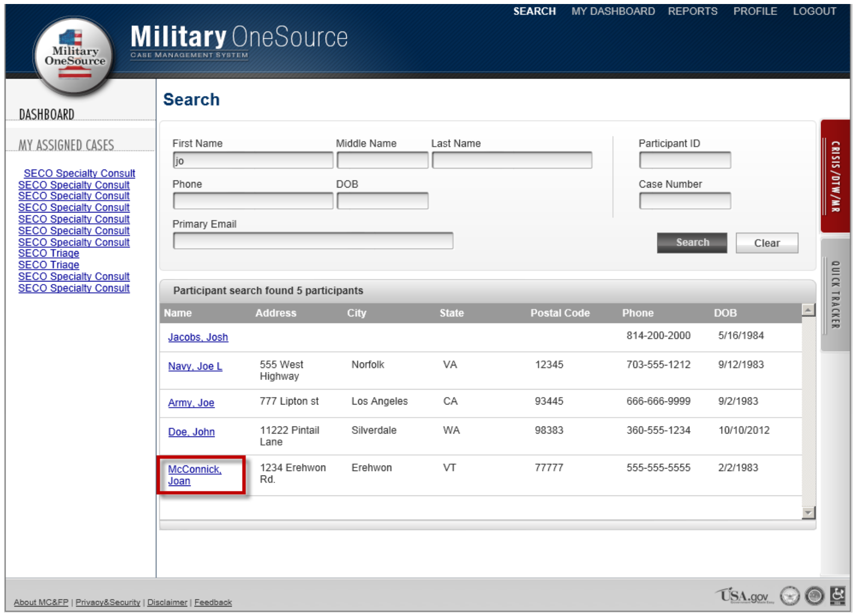


Figure 5.3

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

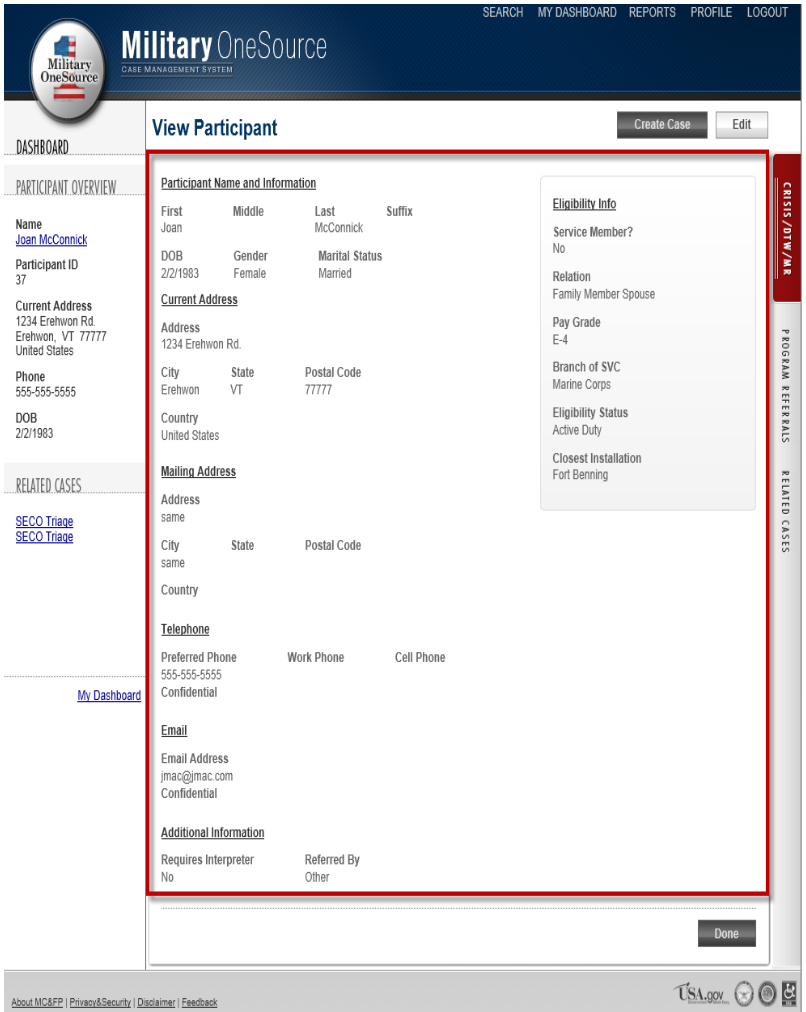


Figure 5.4

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.

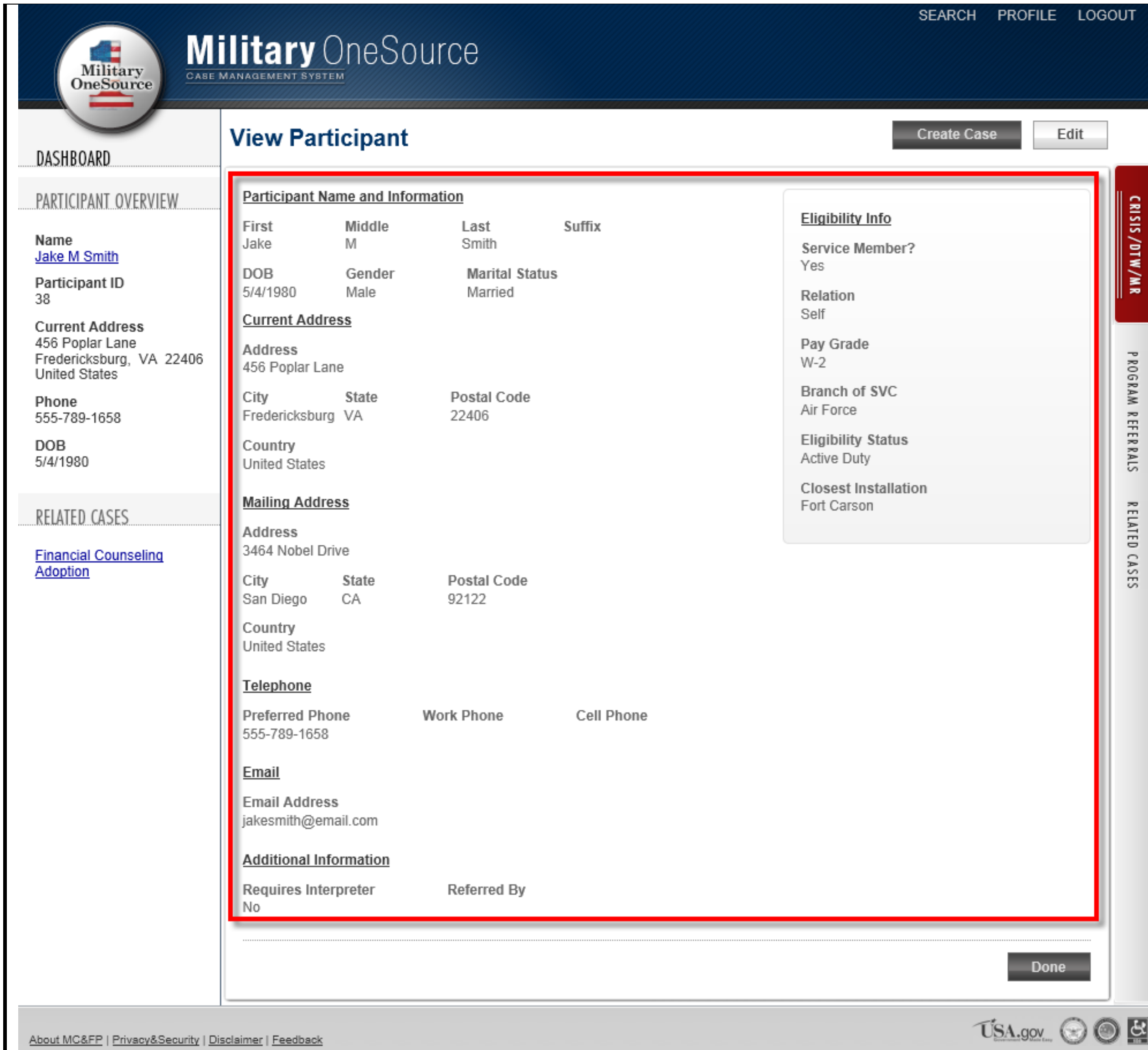


Figure 6.1

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.

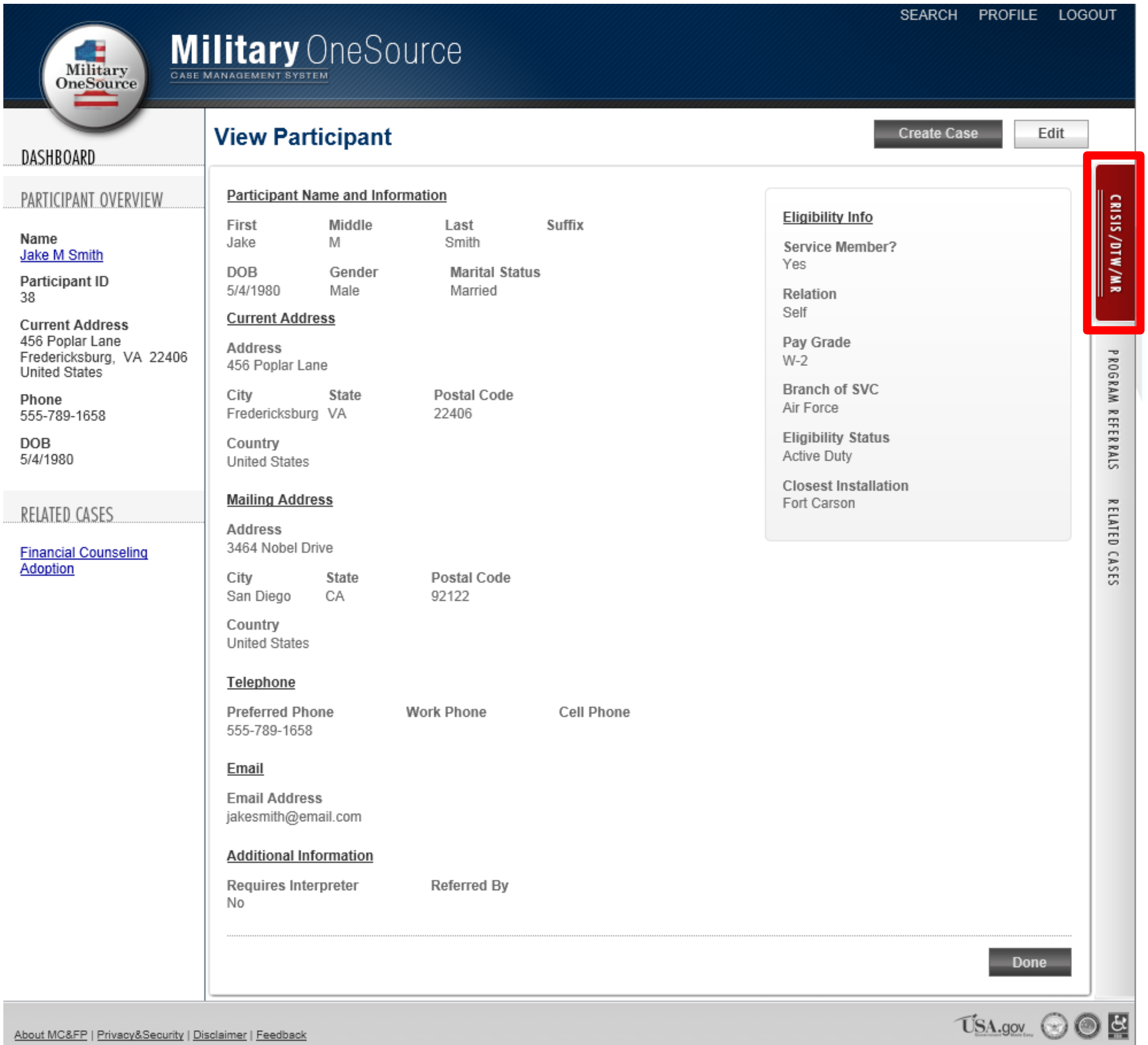

SEARCH PROFILE LOGOUT
Military OneSource
CASE MANAGEMENT SYSTEM
DASHBOARD
PARTICIPANT OVERVIEW
Name
Jake M Smith
Participant ID
38
Current Address
456 Poplar Lane
Fredericksburg, VA 22406
United States
Phone
555-789-1658
DOB
5/4/1980
RELATED CASES
Financial Counseling
Adoption
View Participant
Create Case
Edit
Participant Name and Information
First Jake
Middle M
Last Smith
Suffix
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 555-789-1658
Work Phone
Cell Phone
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/DTW/MR
PROGRAM REFERRALS
RELATED CASES
Done
About MC&FP | Privacy&Security | Disclaimer | Feedback
USA.gov

Figure 6.2

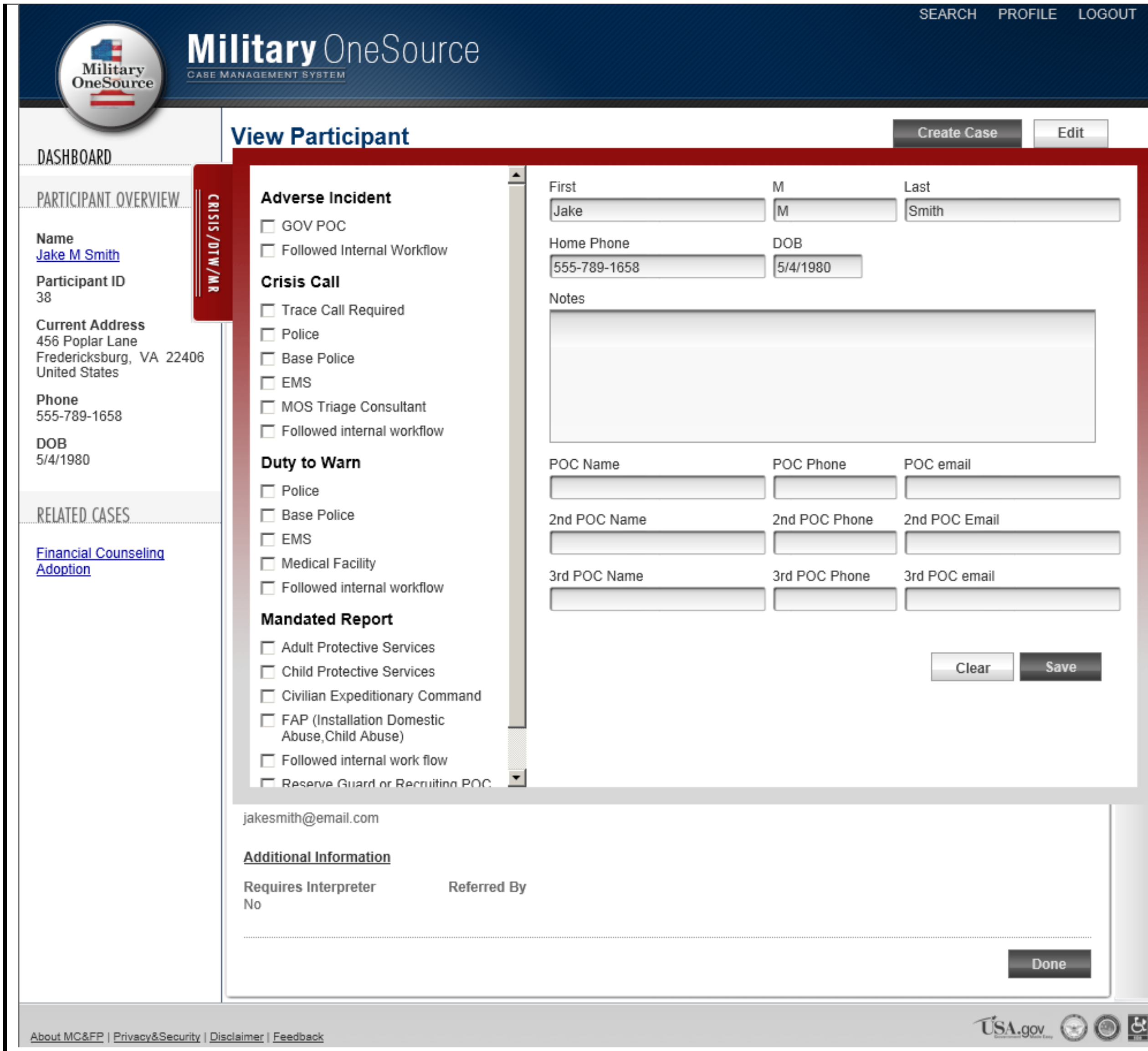


Figure 6.3

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.

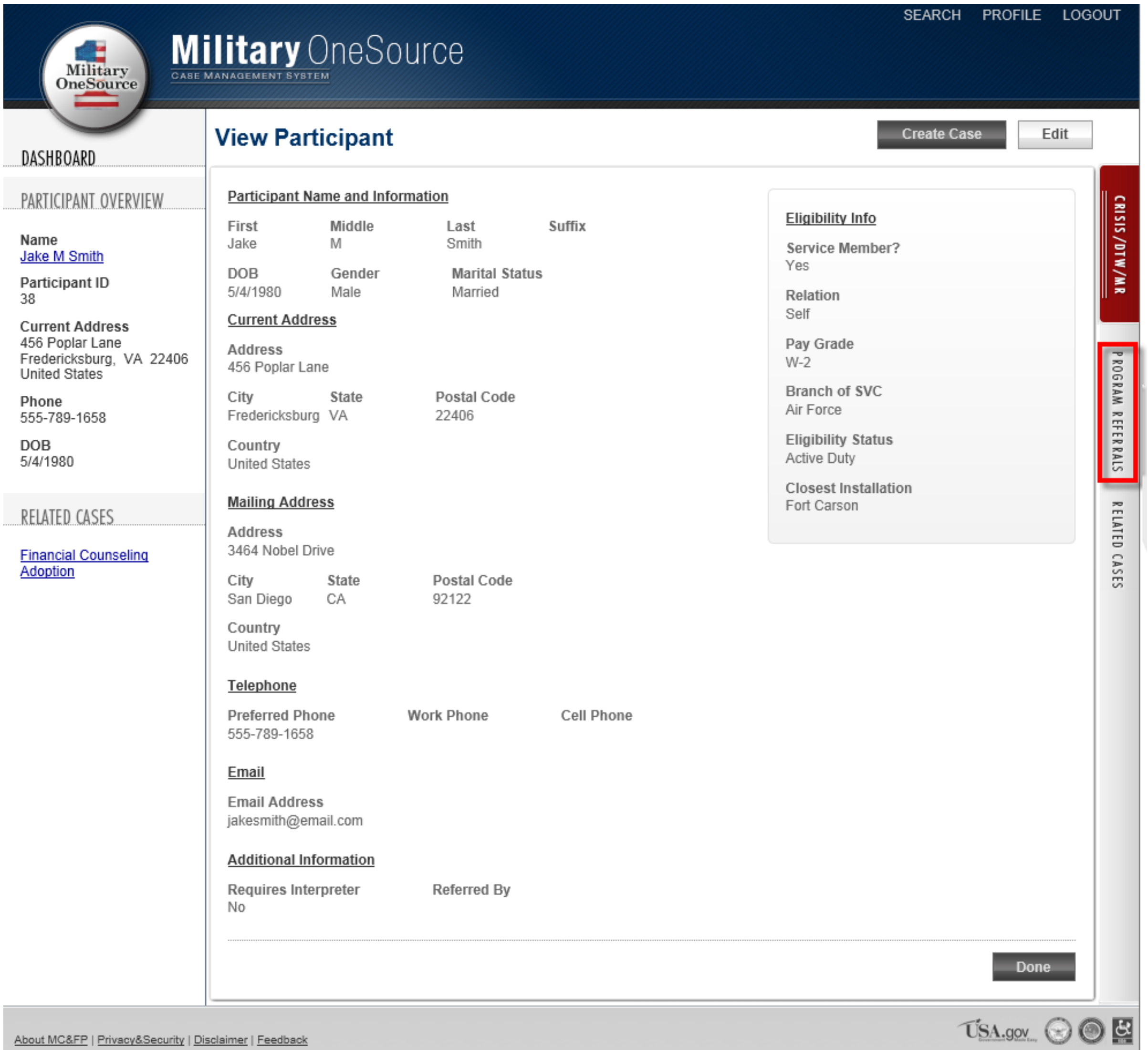

SEARCH
PROFILE
LOGOUT
Military OneSource
CASE MANAGEMENT SYSTEM
DASHBOARD
PARTICIPANT OVERVIEW
Name
Jake M Smith
Participant ID
38
Current Address
456 Poplar Lane
Fredericksburg, VA 22406
United States
Phone
555-789-1658
DOB
5/4/1980
RELATED CASES
Financial Counseling
Adoption
View Participant
Create Case
Edit
Participant Name and Information
First
Jake
Middle
M
Last
Smith
Suffix
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
555-789-1658
Work Phone
Cell Phone
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/DTW/MR
PROGRAM REFERRALS
RELATED CASES
Done
About MC&FP | Privacy&Security | Disclaimer | Feedback
USA.gov

Figure 6.4

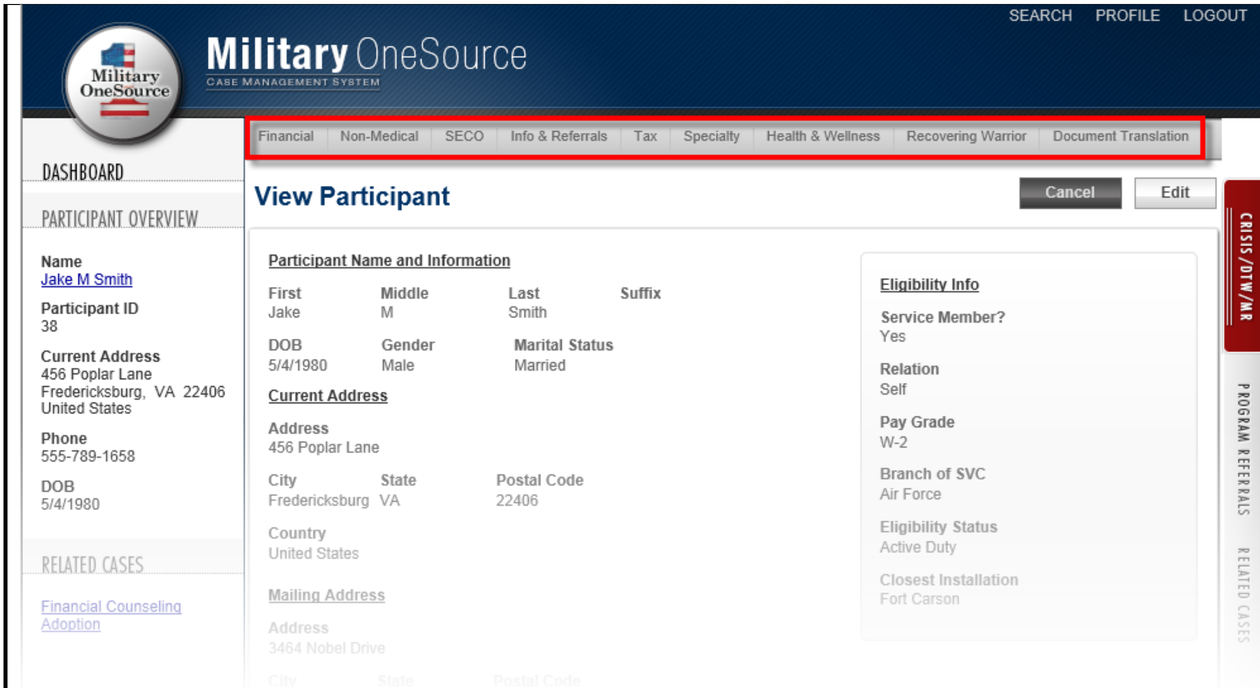


Figure 6.5

7. Related Cases

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

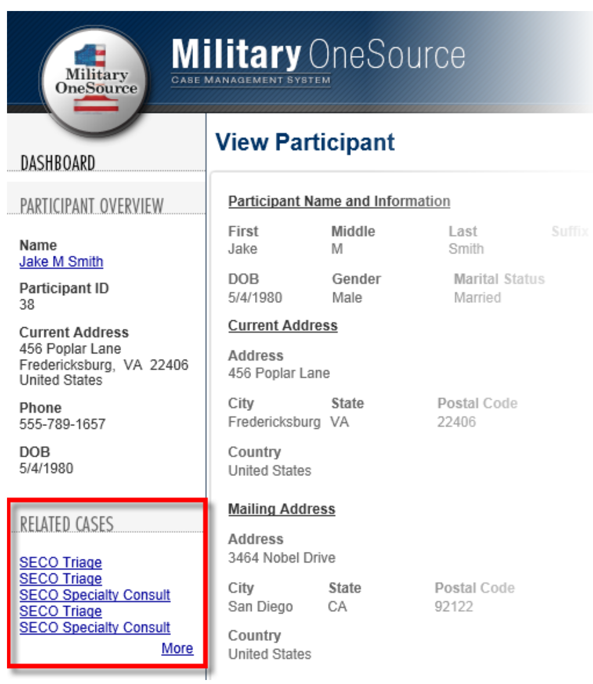


Figure 6.6

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

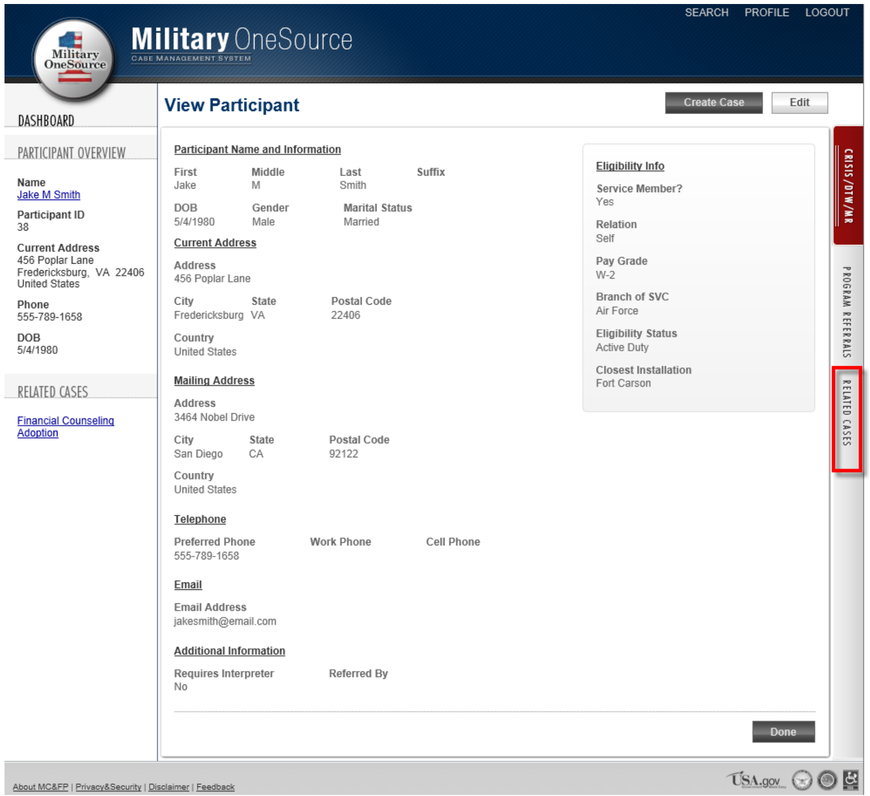


Figure 6.7

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

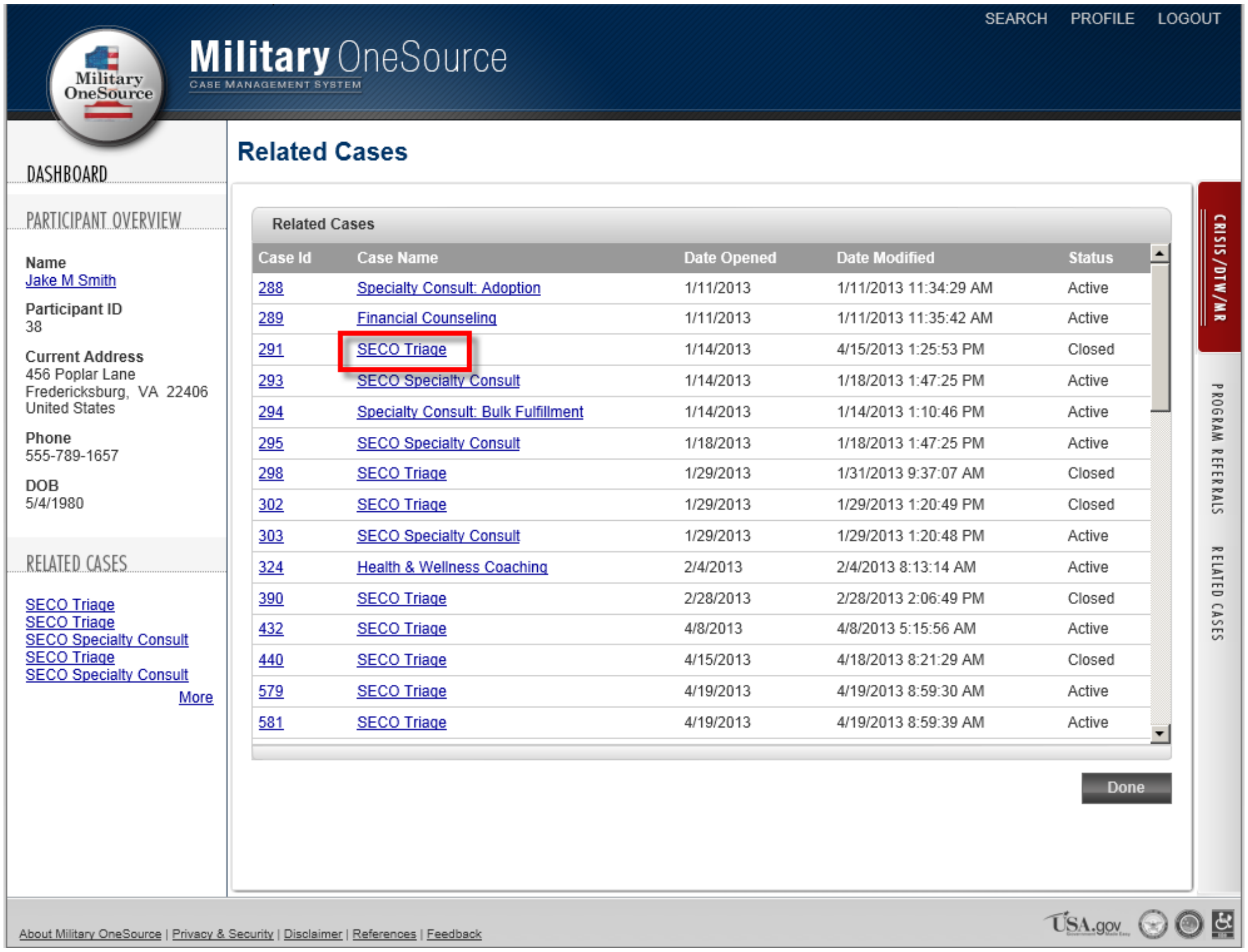

SEARCH PROFILE LOGOUT
Military OneSource
CASE MANAGEMENT SYSTEM
DASHBOARD
PARTICIPANT OVERVIEW
Name
Jake M Smith
Participant ID
38
Current Address
456 Poplar Lane
Fredericksburg, VA 22406
United States
Phone
555-789-1657
DOB
5/4/1980
RELATED CASES
SECO Triage
SECO Triage
SECO Specialty Consult
SECO Triage
SECO Specialty Consult
More
Related Cases
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
CRISIS/DTW/MR
PROGRAM REFERRALS
RELATED CASES
About Military OneSource | Privacy & Security | Disclaimer | References | Feedback
USA.gov

Figure 6.8

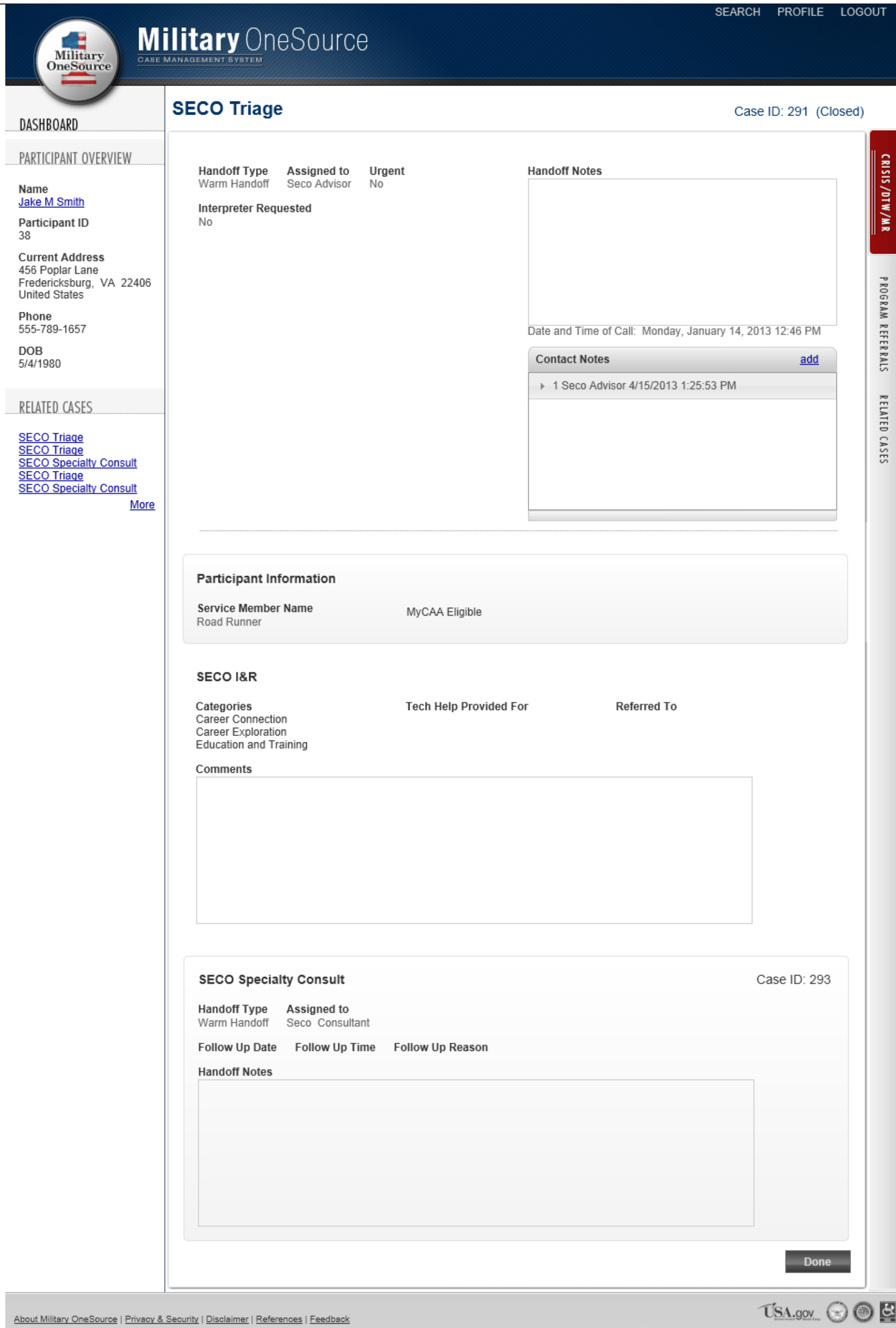

SEARCH PROFILE LOGOUT
Military OneSource
CASE MANAGEMENT SYSTEM
DASHBOARD
PARTICIPANT OVERVIEW
Name
Jake M Smith
Participant ID
38
Current Address
456 Poplar Lane
Fredericksburg, VA 22406
United States
Phone
555-789-1657
DOB
5/4/1980
RELATED CASES
SECO Triage
SECO Triage
SECO Specialty Consult
SECO Triage
SECO Specialty Consult
More
SECO Triage
Case ID: 291 (Closed)
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
CRISIS/DTW/MR
PROGRAM REFERRALS
RELATED CASES
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
About Military OneSource | Privacy & Security | Disclaimer | References | Feedback
USA.gov

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.

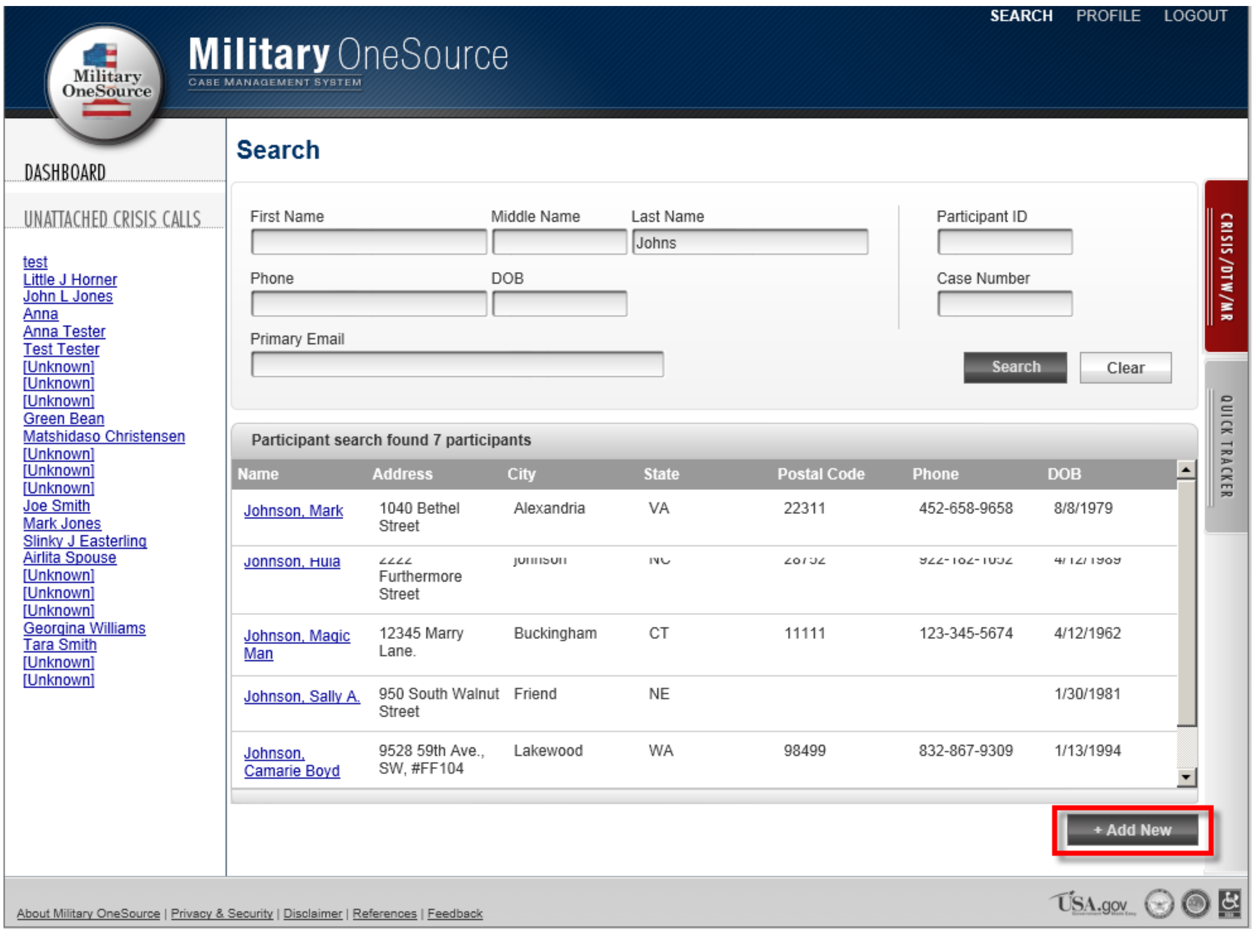


Figure 7.1

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).

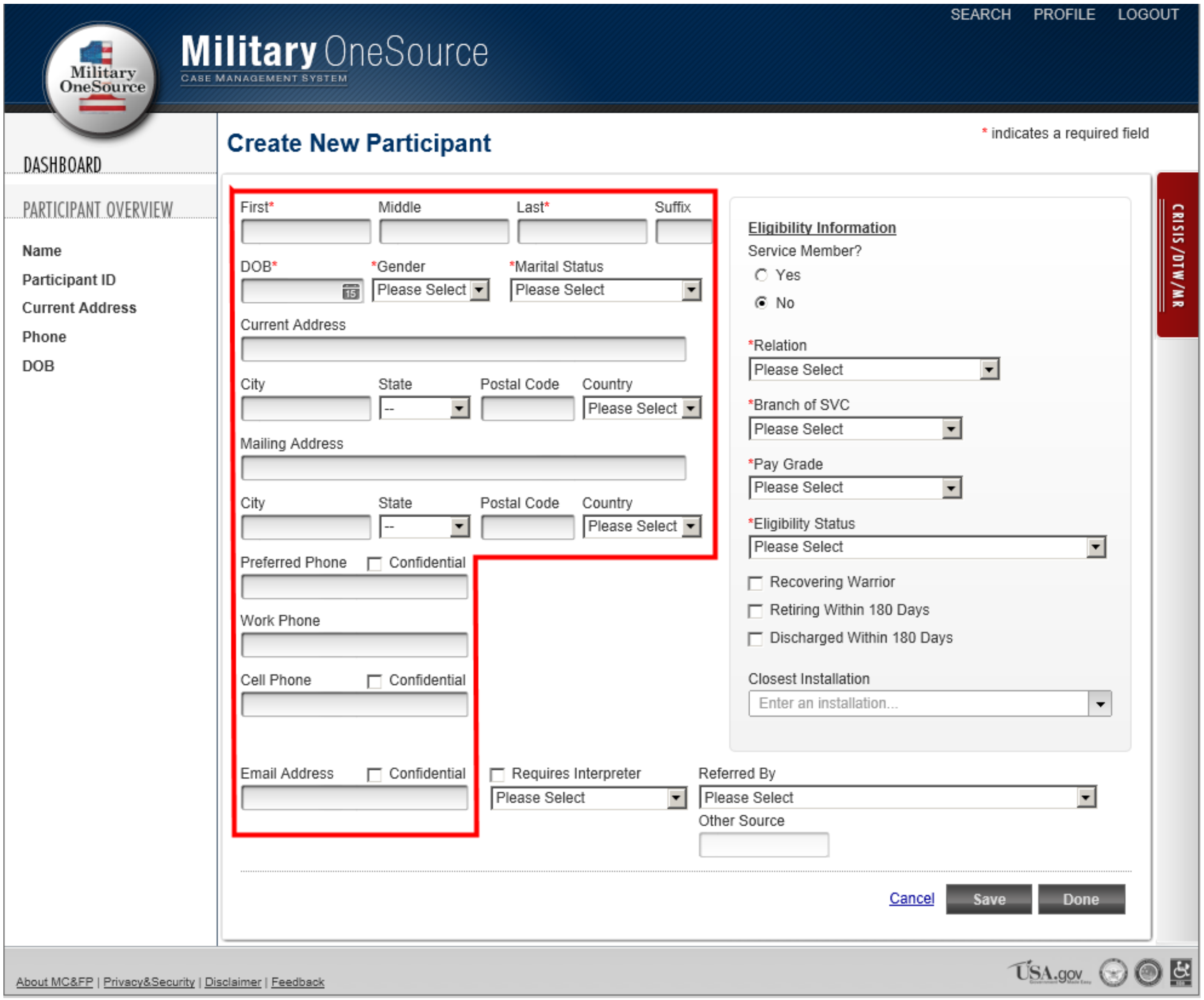


Figure 7.2

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).

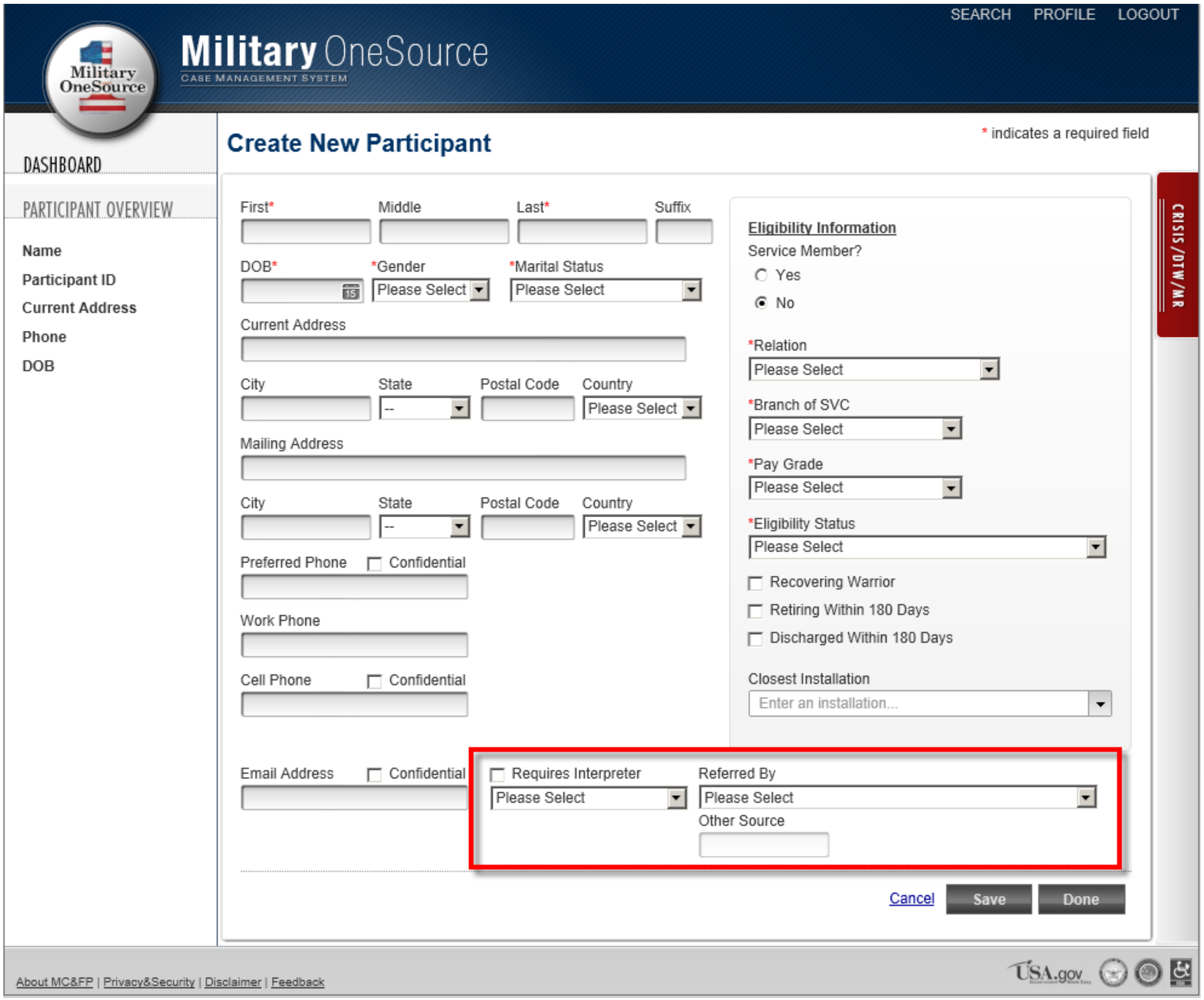


Figure 7.3

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).

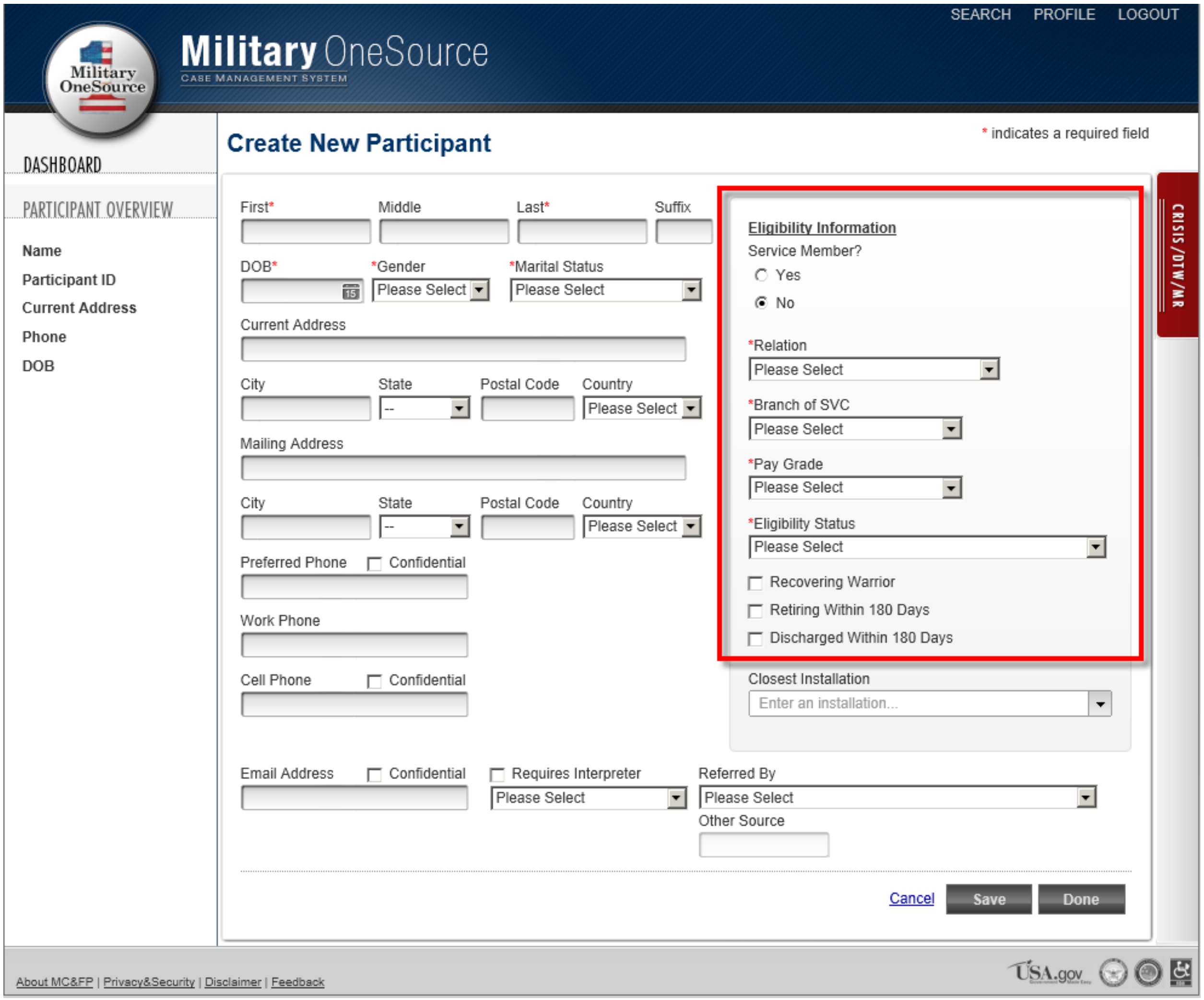
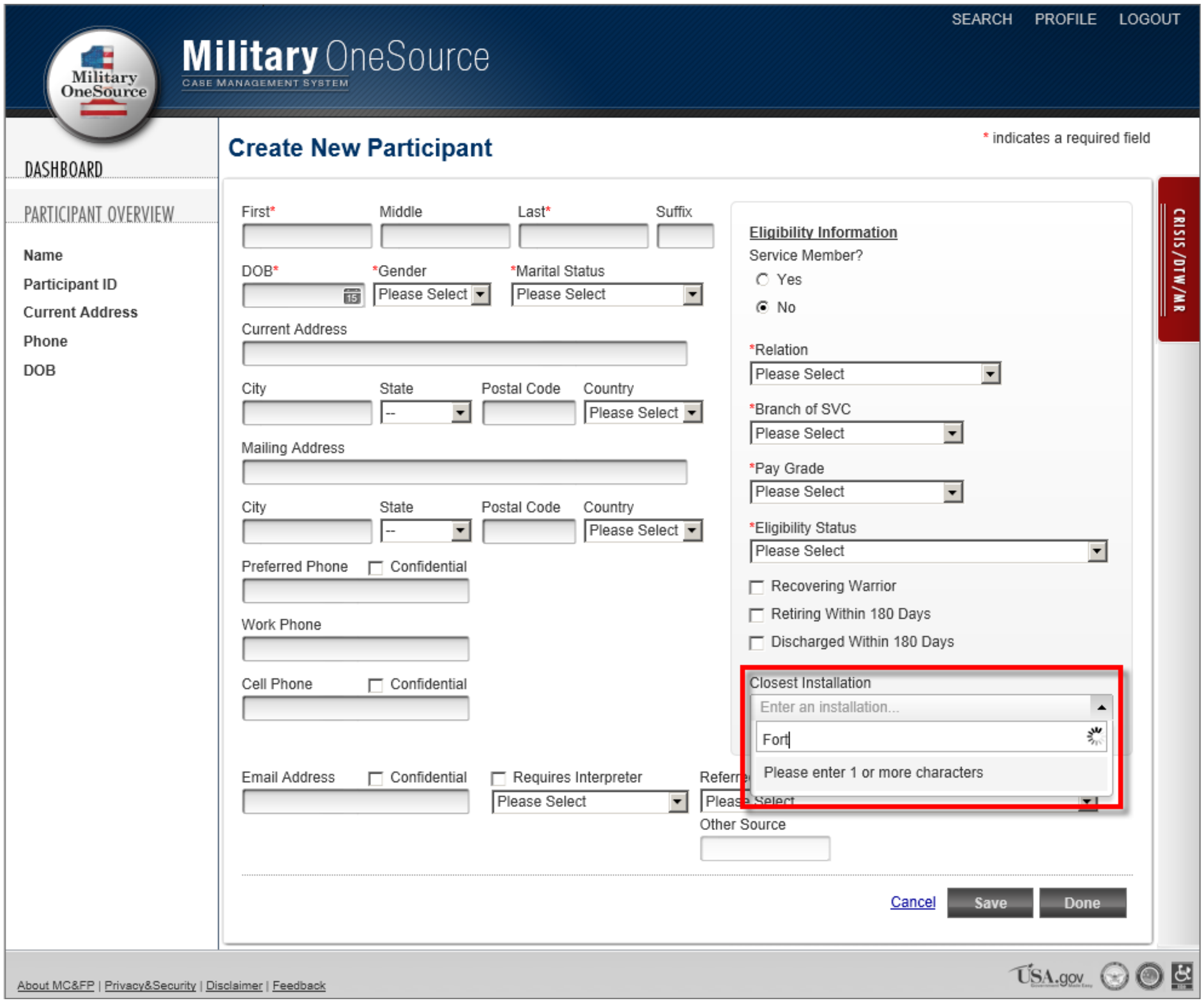


Figure 7.4

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).


SEARCH
PROFILE
LOGOUT
Military OneSource
CASE MANAGEMENT SYSTEM
Create New Participant
* indicates a required field
DASHBOARD
PARTICIPANT OVERVIEW
Name
Participant ID
Current Address
Phone
DOB
First*
Middle
Last*
Suffix
DOB*
*Gender
*Marital Status
Please Select
Current Address
City
State
Postal Code
Country
Mailing Address
Preferred Phone
Confidential
Work Phone
Cell Phone
Email Address
Requires Interpreter
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...
Fort
Please enter 1 or more characters
Cancel
Save
Done
CRISIS/DTW/MR
About MC&FP | Privacy&Security | Disclaimer | Feedback
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.

Figure 7.6

Editing a Participant

1. Select the participant from the Search screen.

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

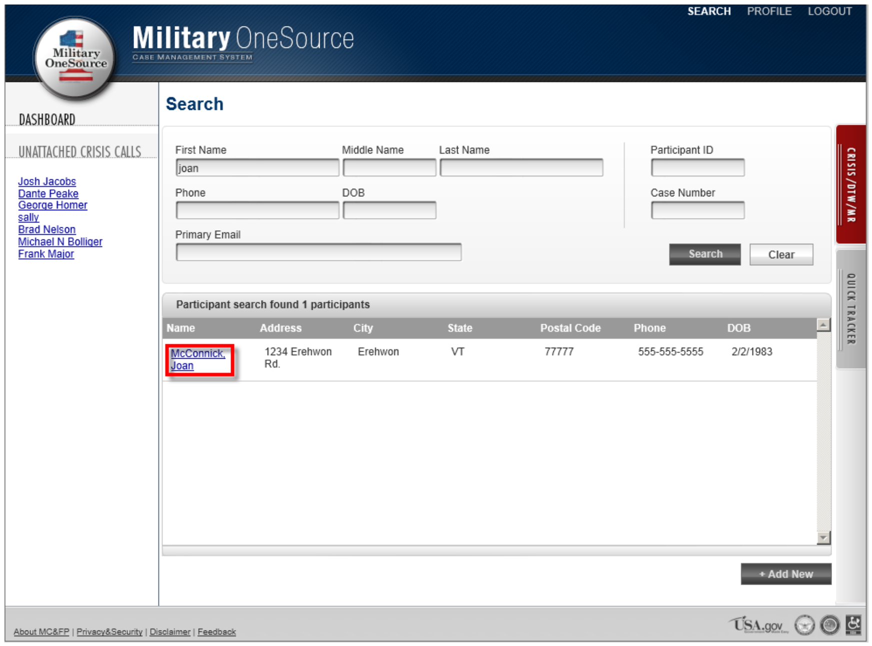


Figure 8.1

2. Click Edit

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.

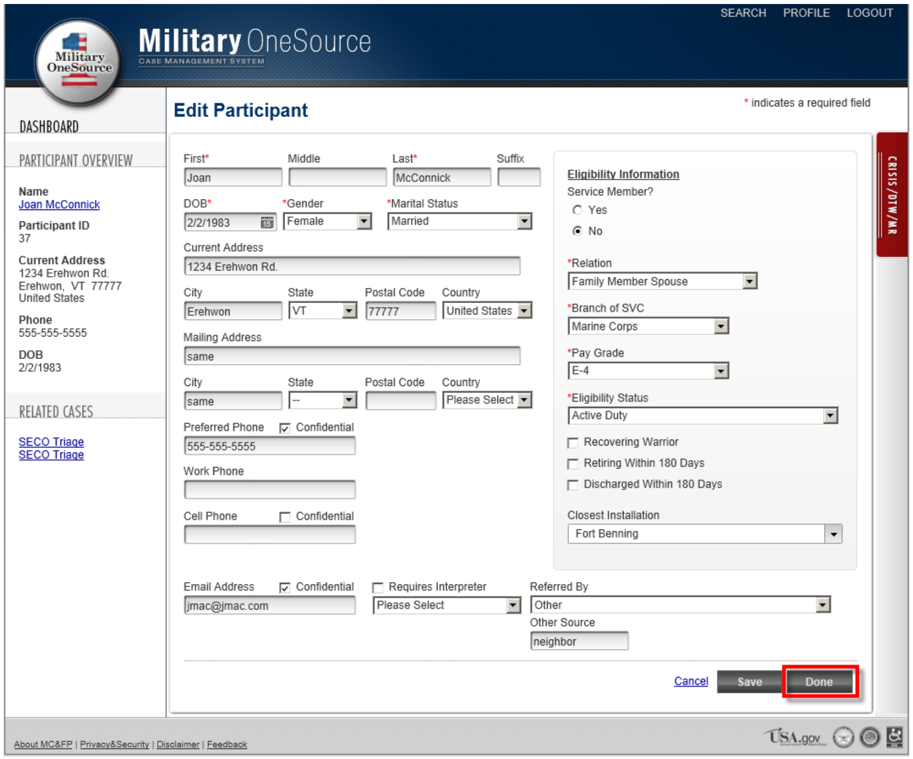


Figure 8.3

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.

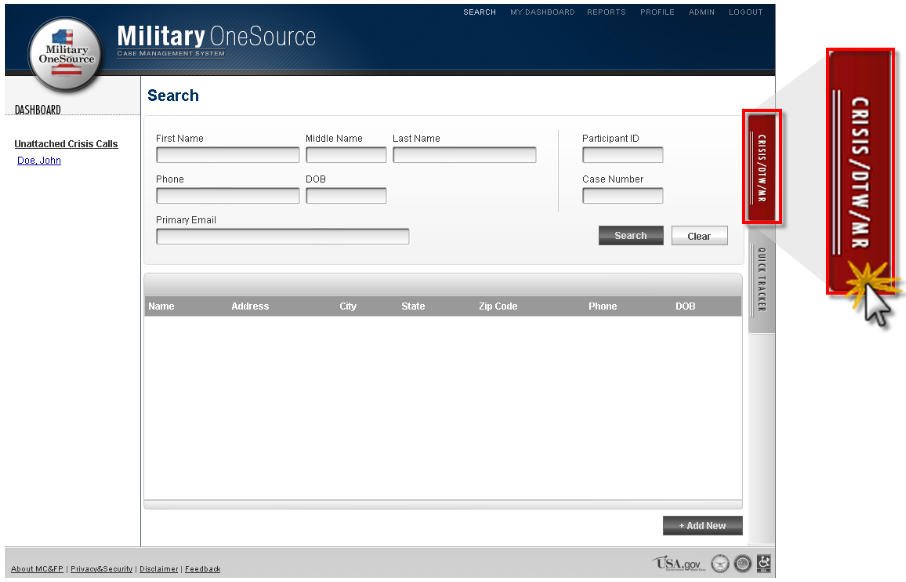


Figure 9.1

When clicked the drawer will slide out to the left.

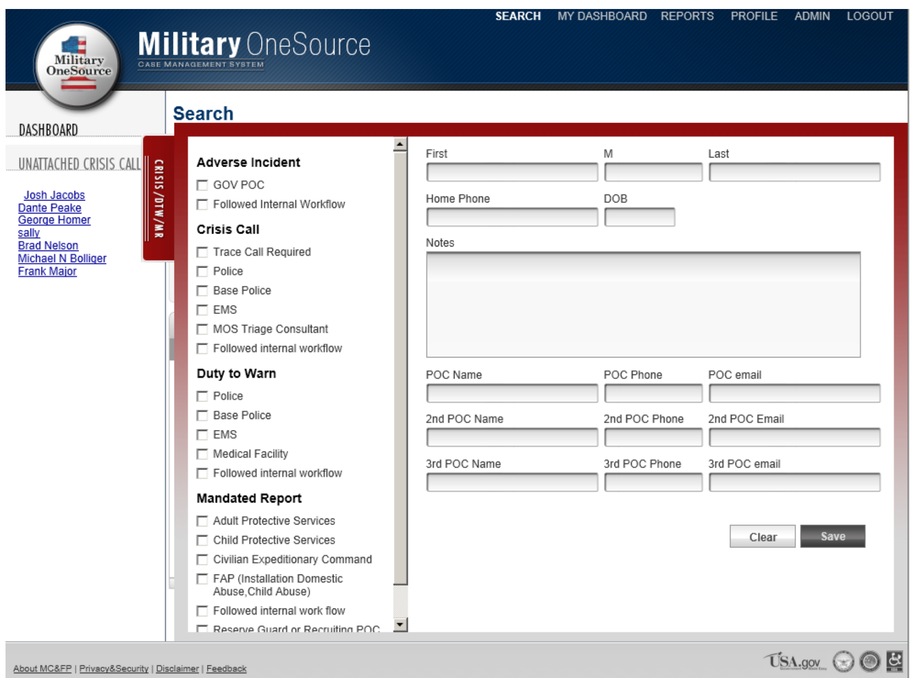


Figure 9.2

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.

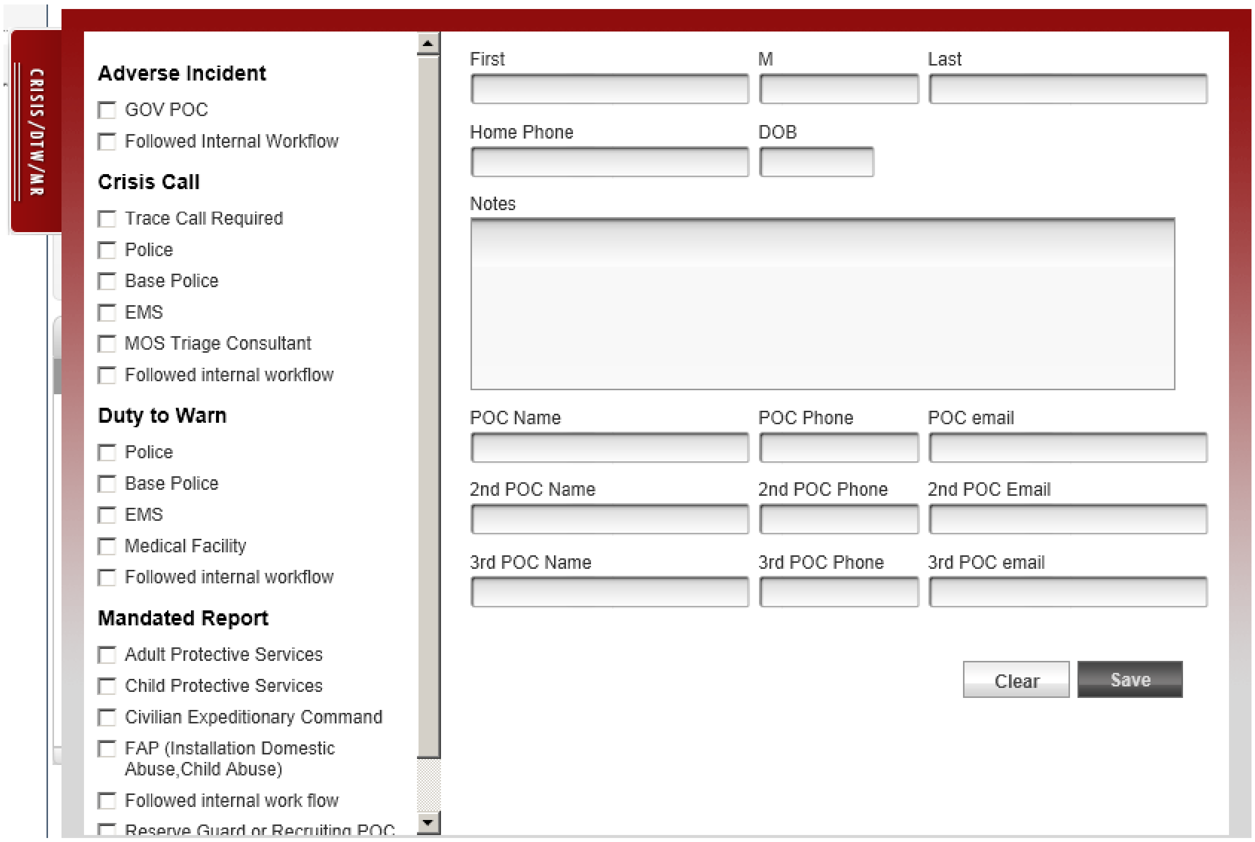


Figure 9.3

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.

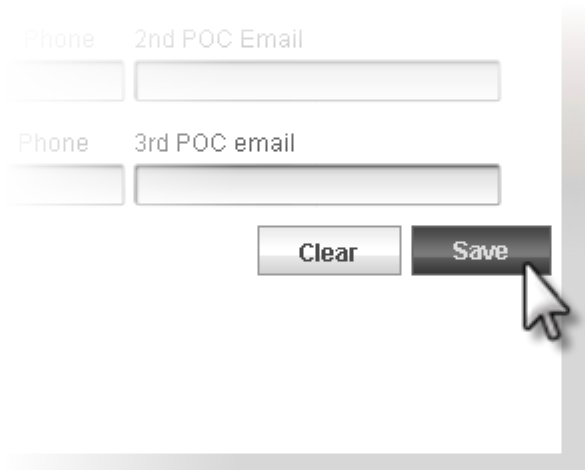


Figure 9.4

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.

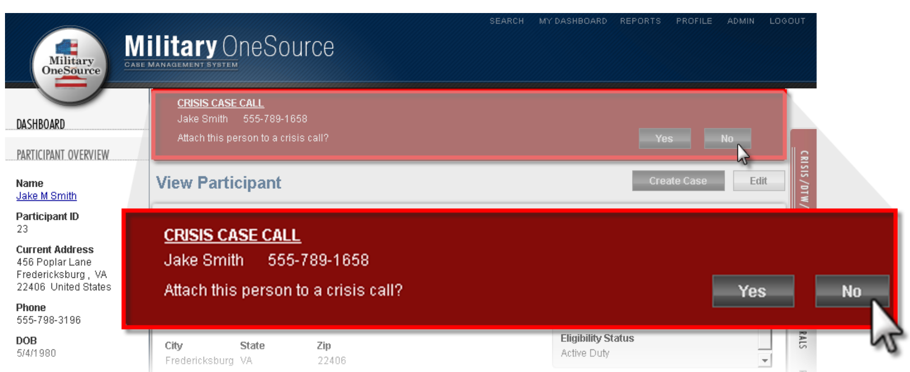


Figure 10.1

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).

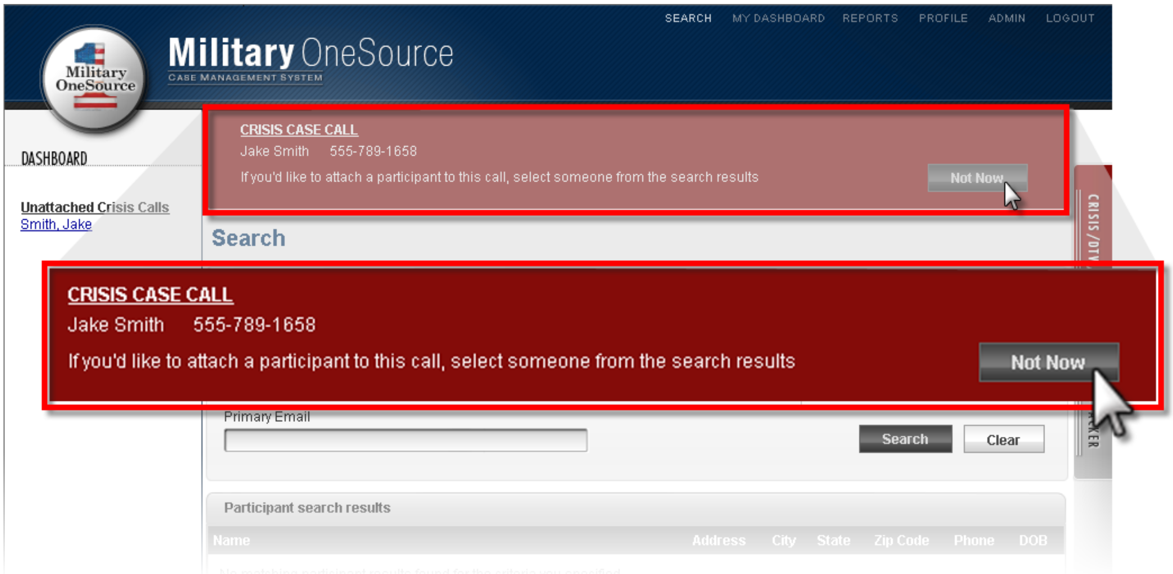


Figure 10.2

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.

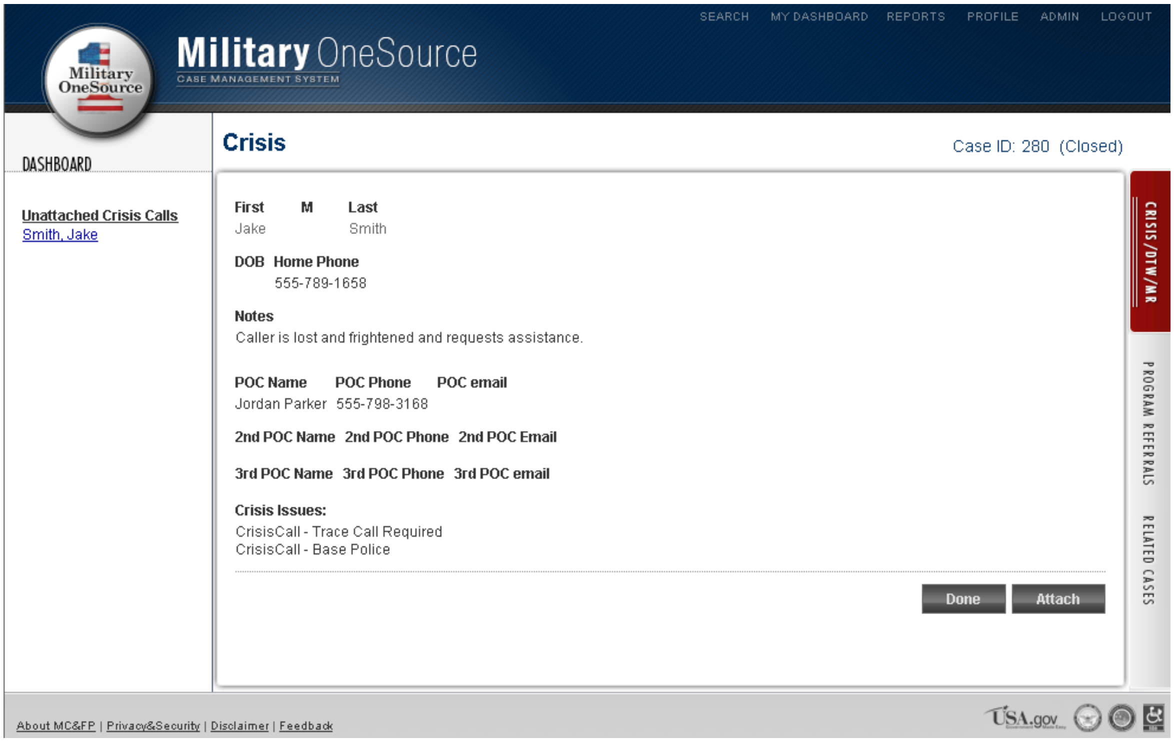


Figure 10.4

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).

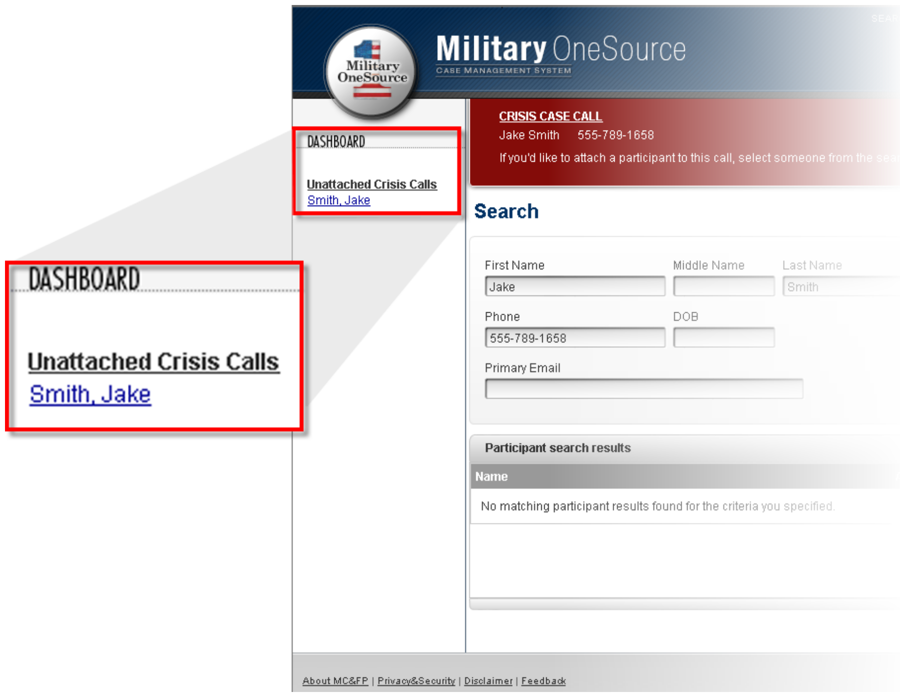


Figure 11.1

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

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).

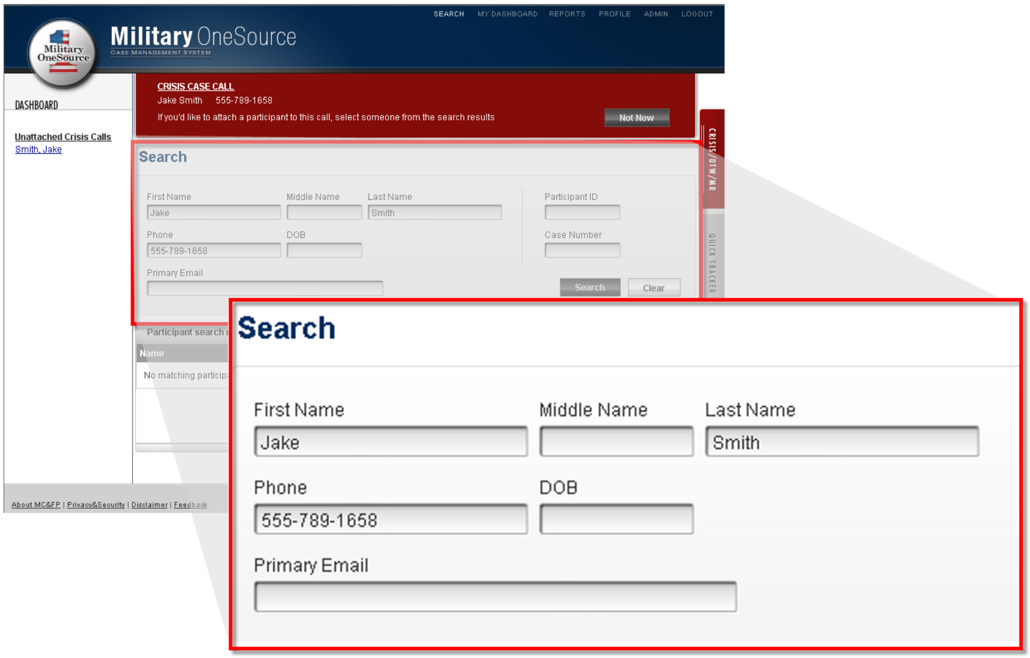


Figure 11.2

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.

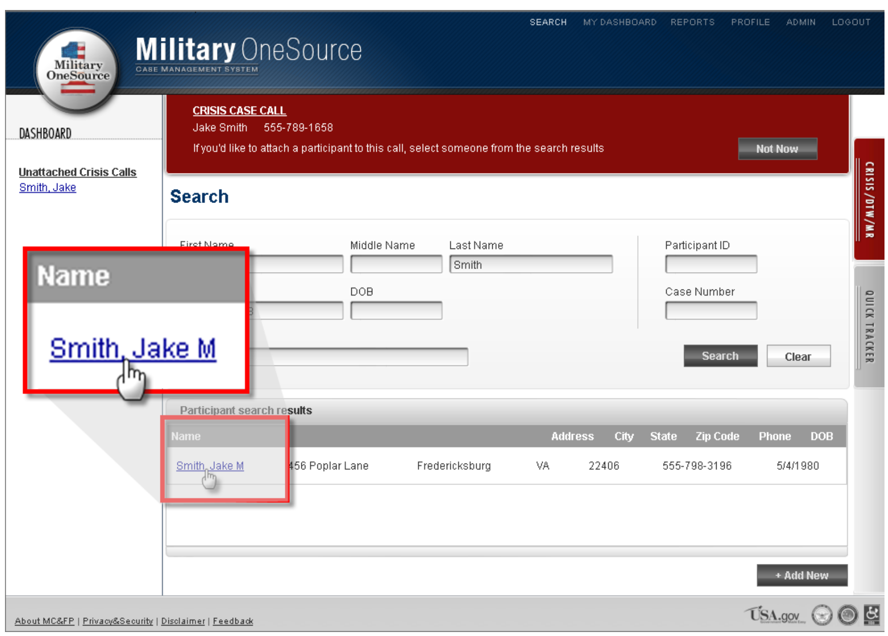


Figure 11.3

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.

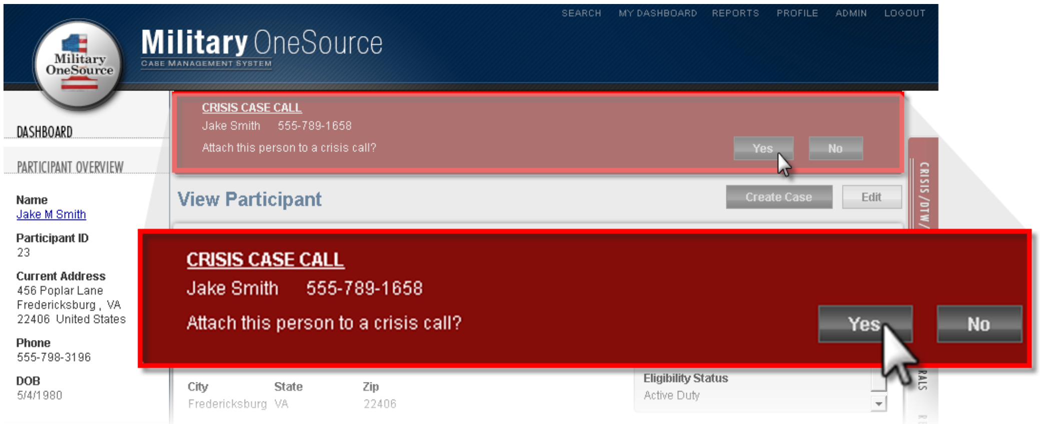


Figure 11.4

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.

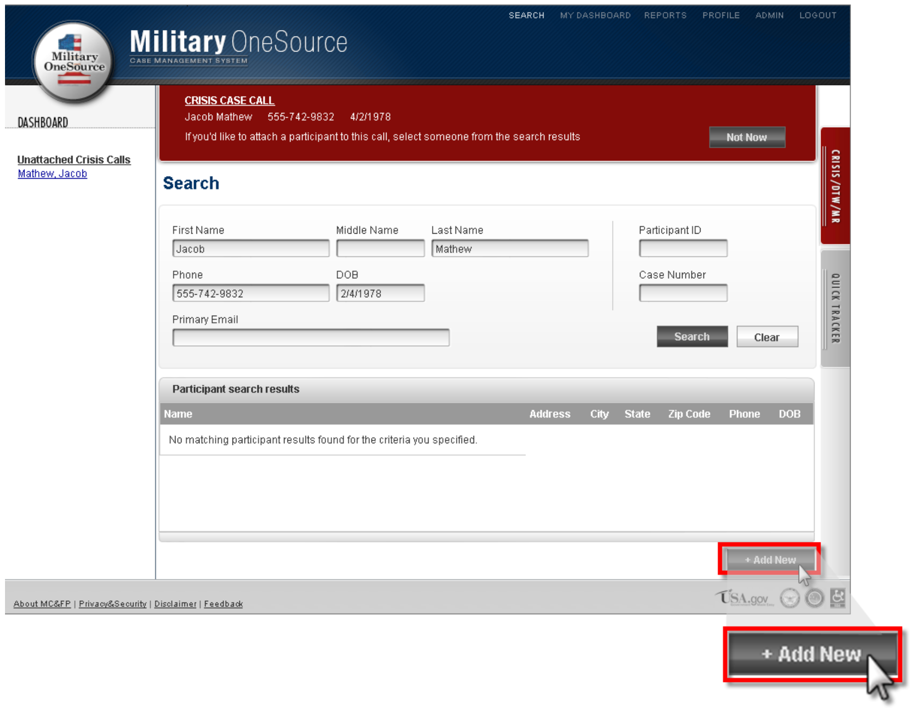


Figure 12.1

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

For guidance in creating a new participant's record, see Creating a Participant Record.

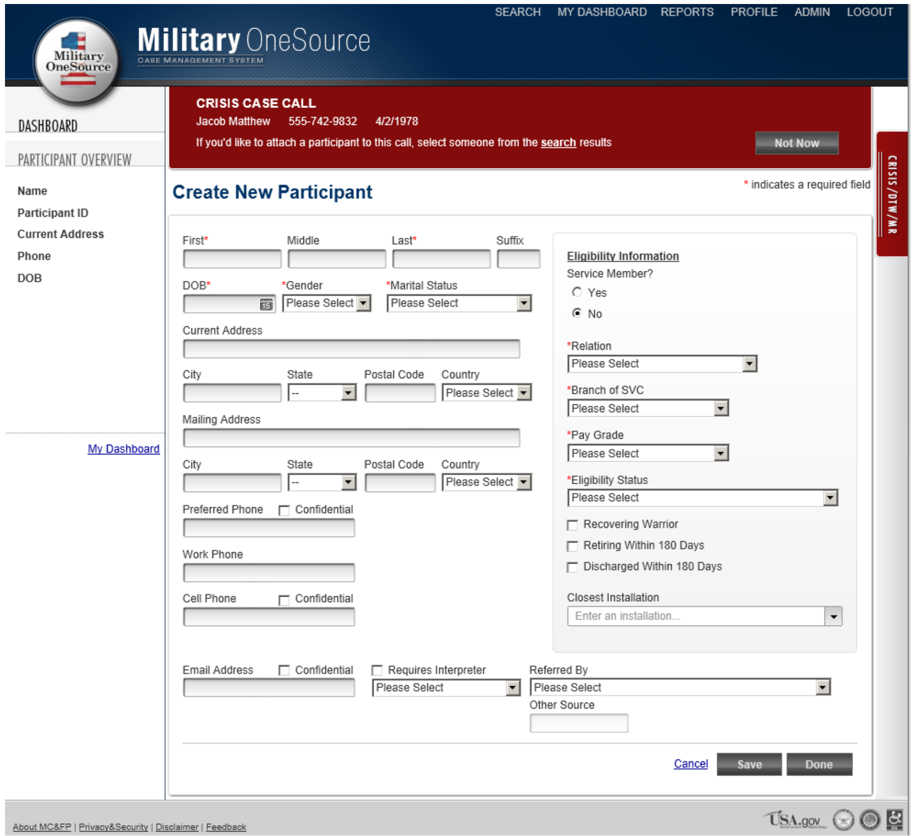


Figure 12.2

3. Click Yes in the Crisis Case Call banner

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.


SEARCH
MY DASHBOARD
REPORTS
PROFILE
ADMIN
LOGOUT
Military OneSource
CASE MANAGEMENT SYSTEM
DASHBOARD
PARTICIPANT OVERVIEW
Name
Jacob Mathew
Participant ID
24
Current Address
798 Palm Avenue
San Diego , CA
92122 United States
Phone
555-742-9832
DOB
4/2/1978
RELATED CASES
Related Cases
CRISIS/DTW/MR
PROGRAM REFERRALS
RELATED CASES
Related Cases
Case Id
Case Name
Date Opened
Date Modified
Status
267
Crisis
8/3/2012
8/3/2012 10:36:07 AM
Closed

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.

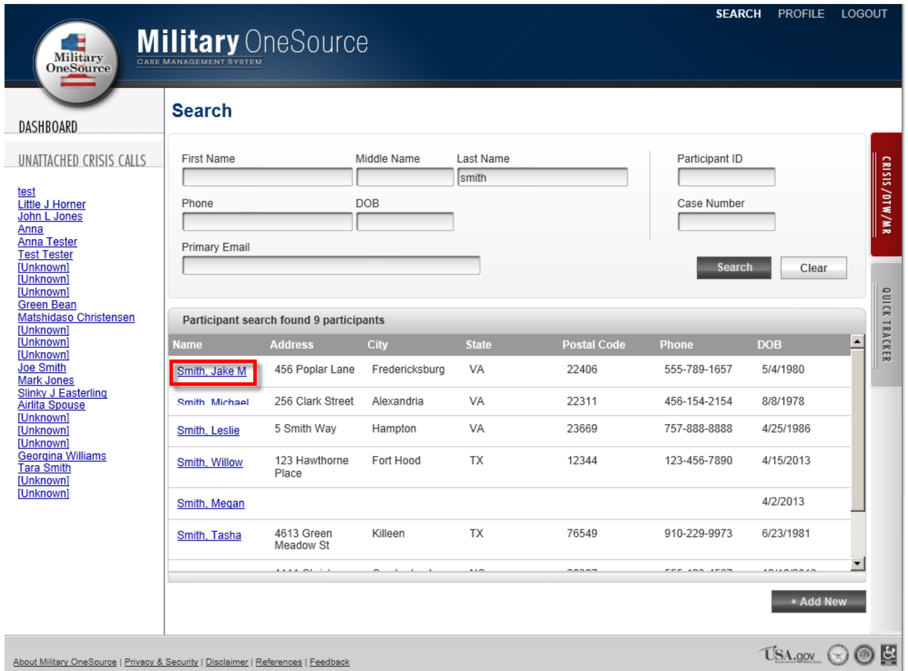


Figure 13.1

2. Click on the Create Case button.

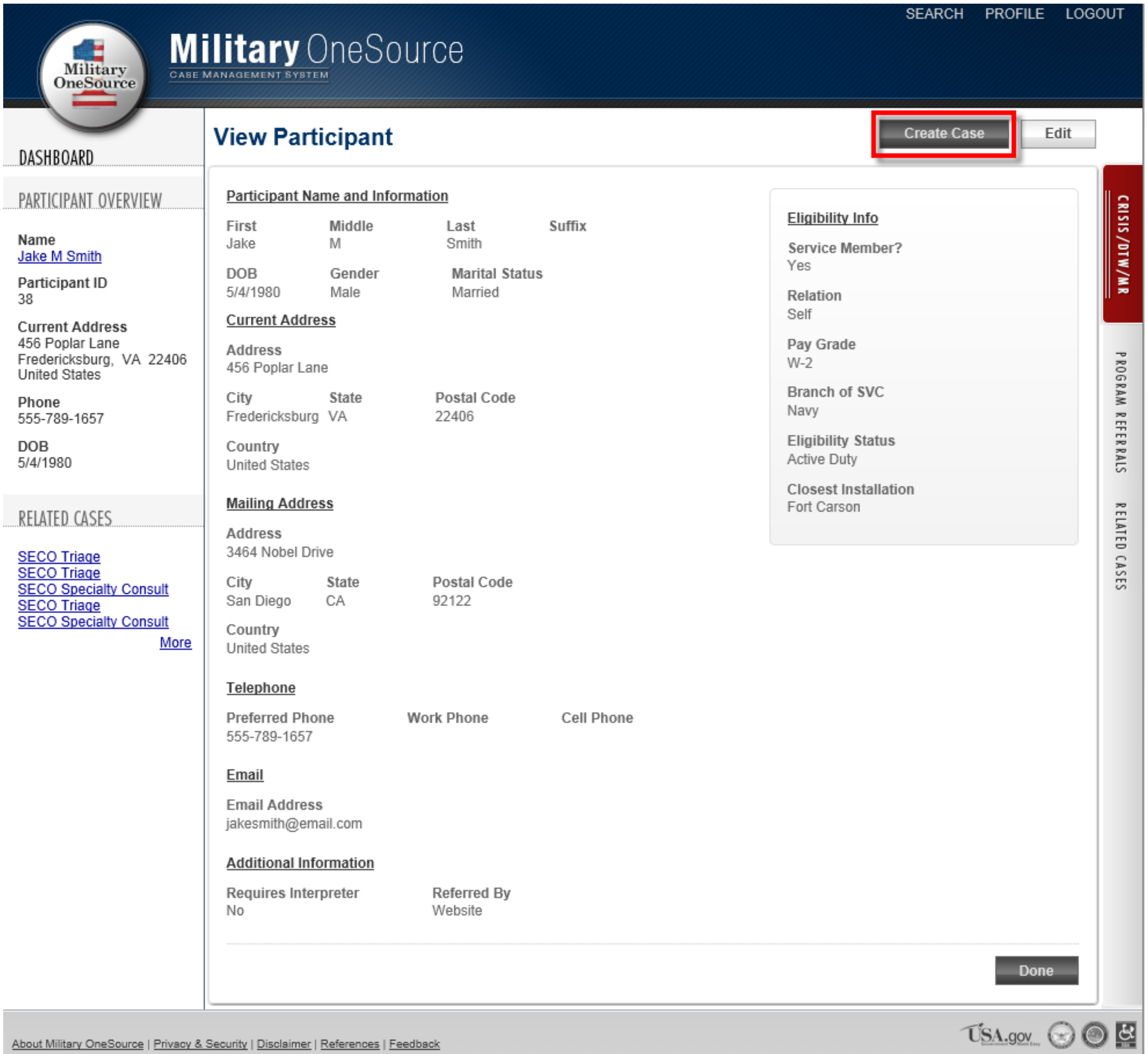


Figure 13.2

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.

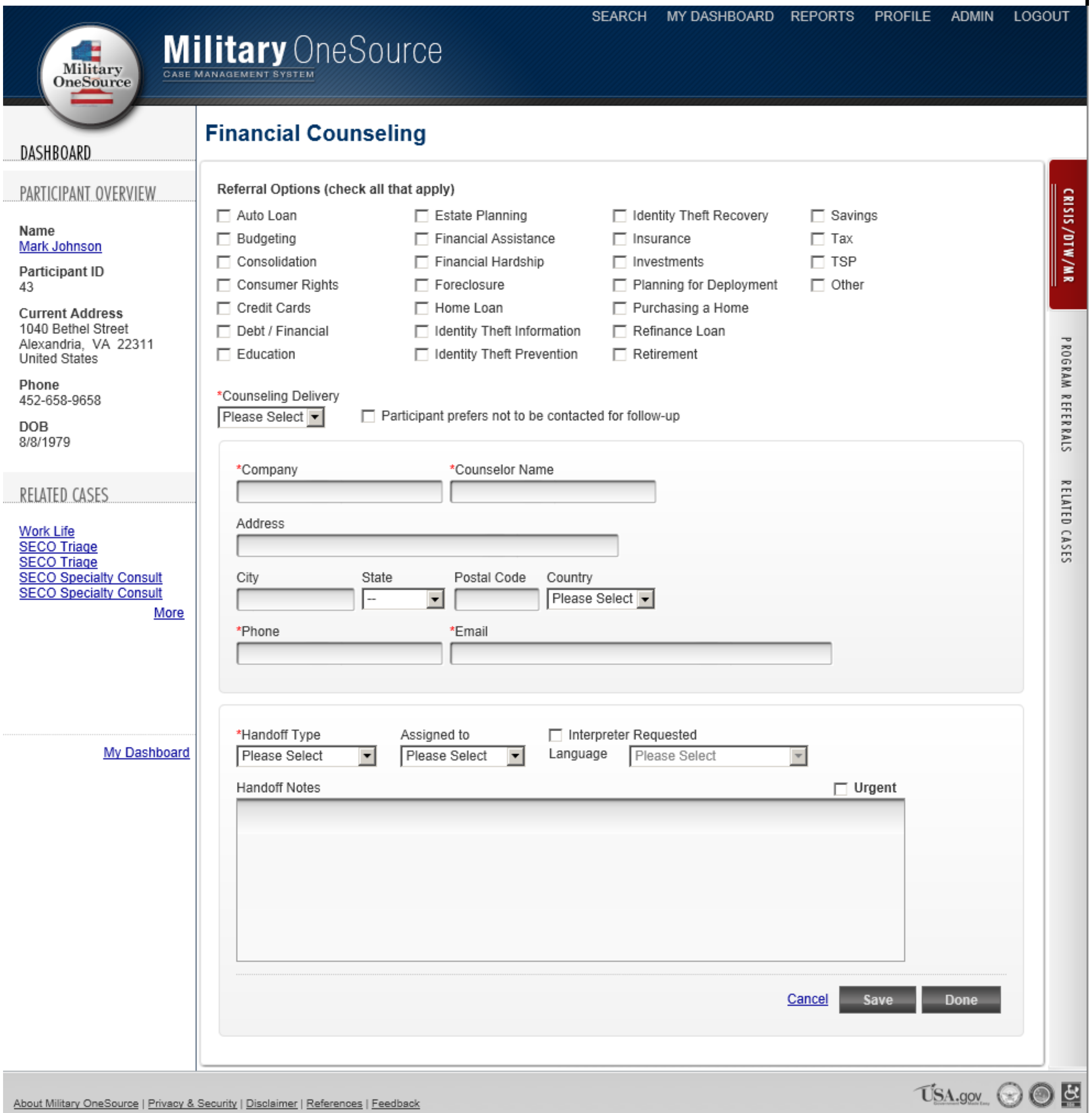


Figure 14.1

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.

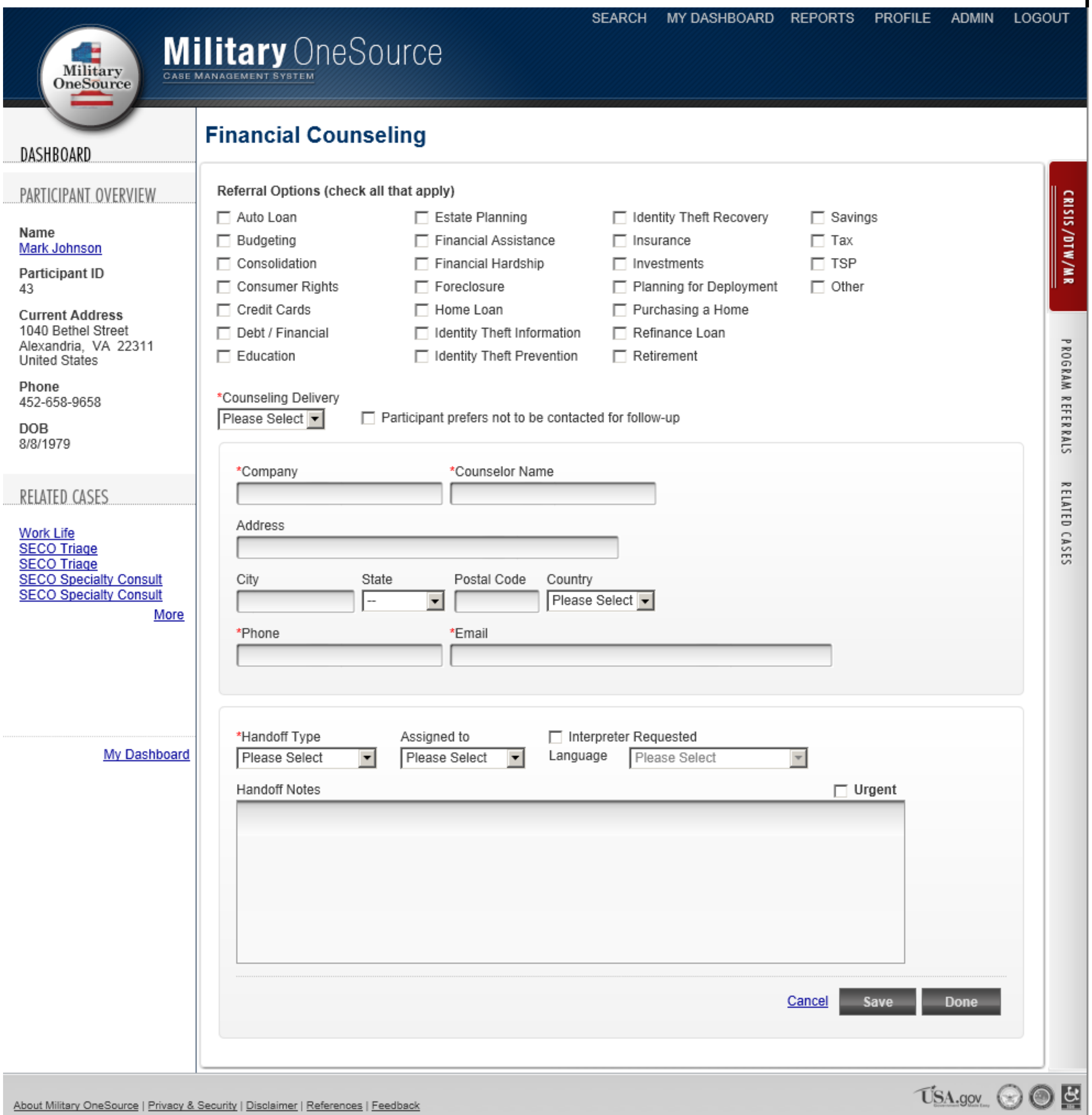


Figure 14.1

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.

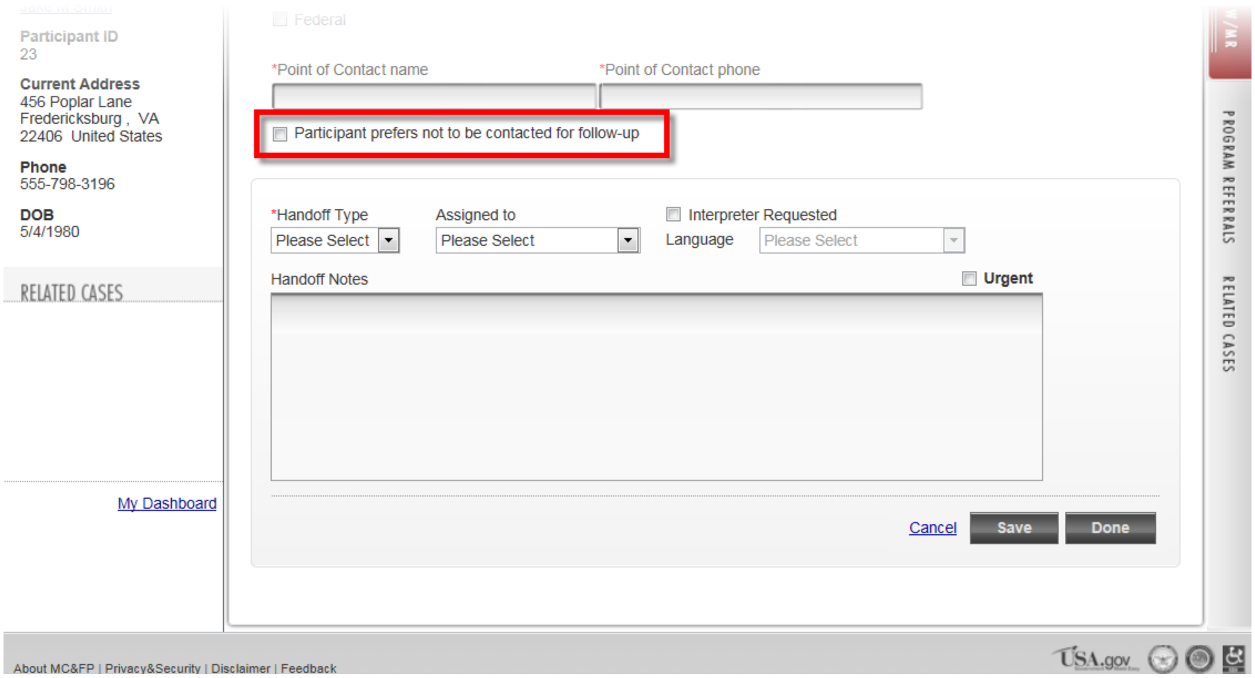


Figure 13.5

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.

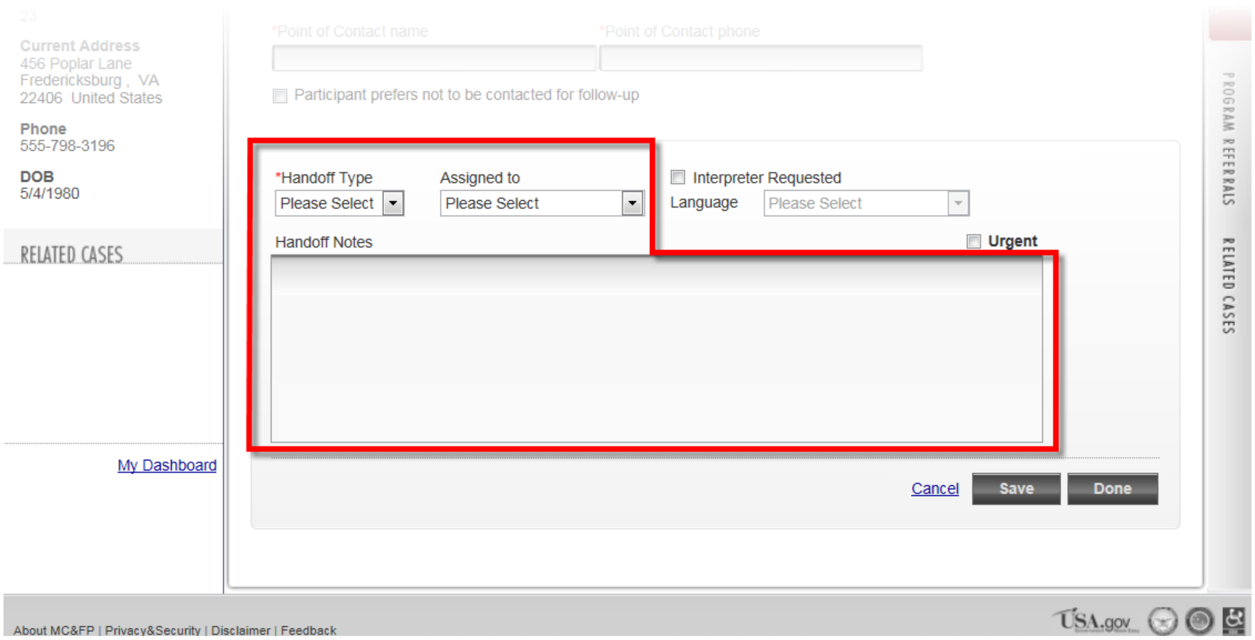


Figure 13.6

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.

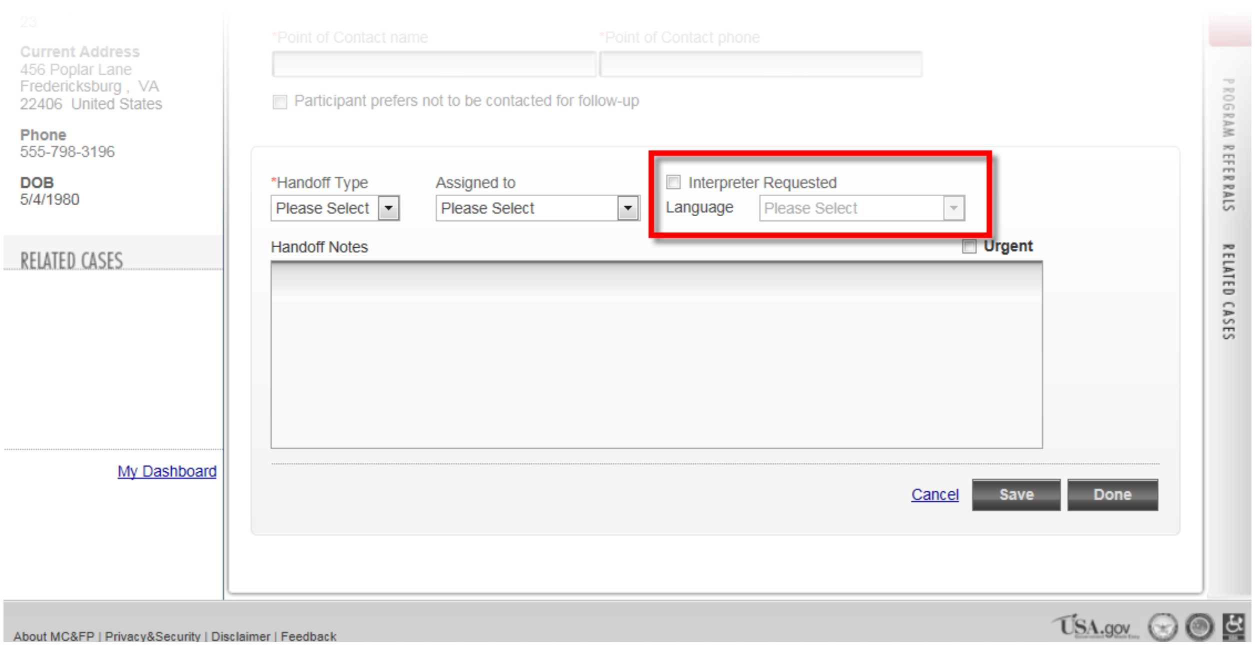


Figure 13.7

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.

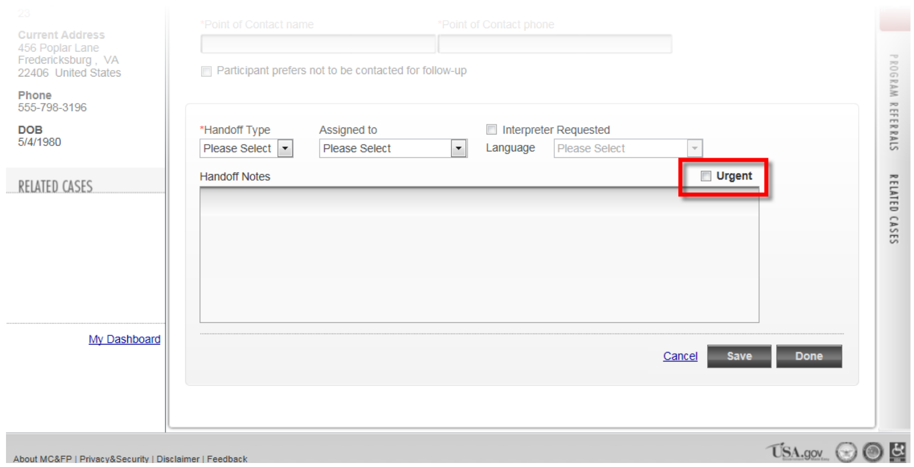


Figure 13.8

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.

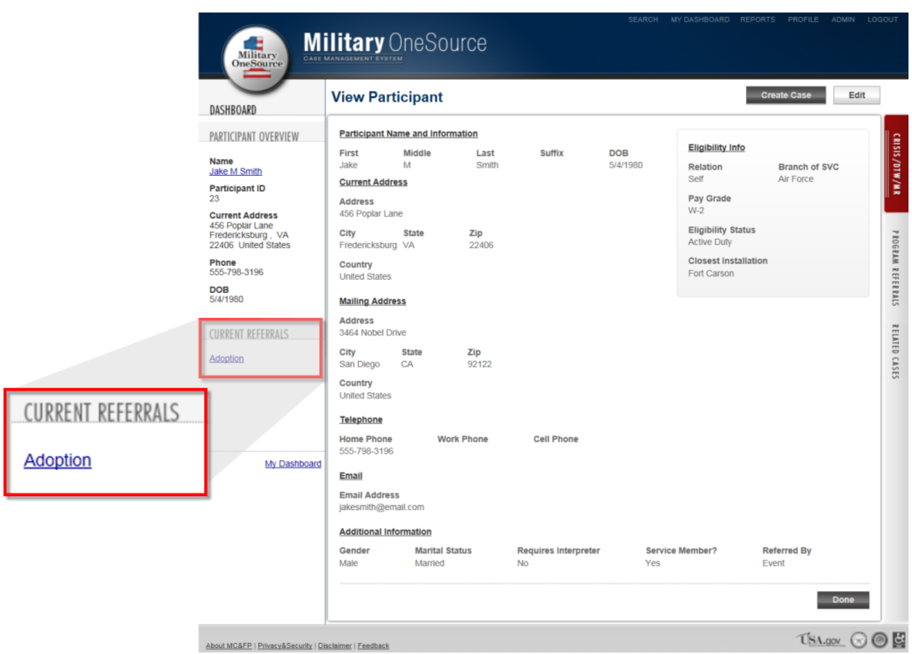


Figure 13.9

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.

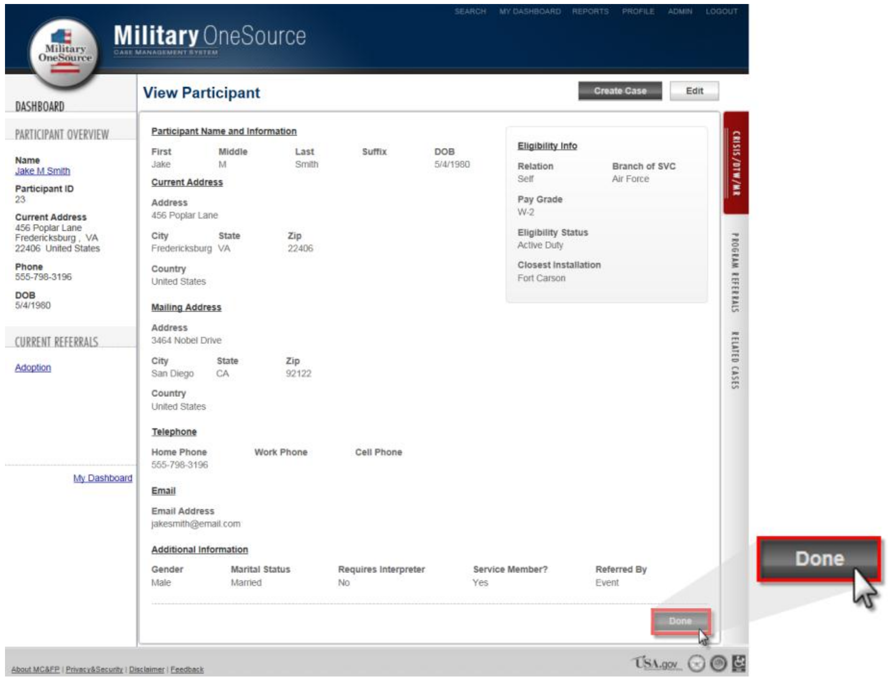


Figure 13.10

Financial Counseling

10. Select Financial.

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

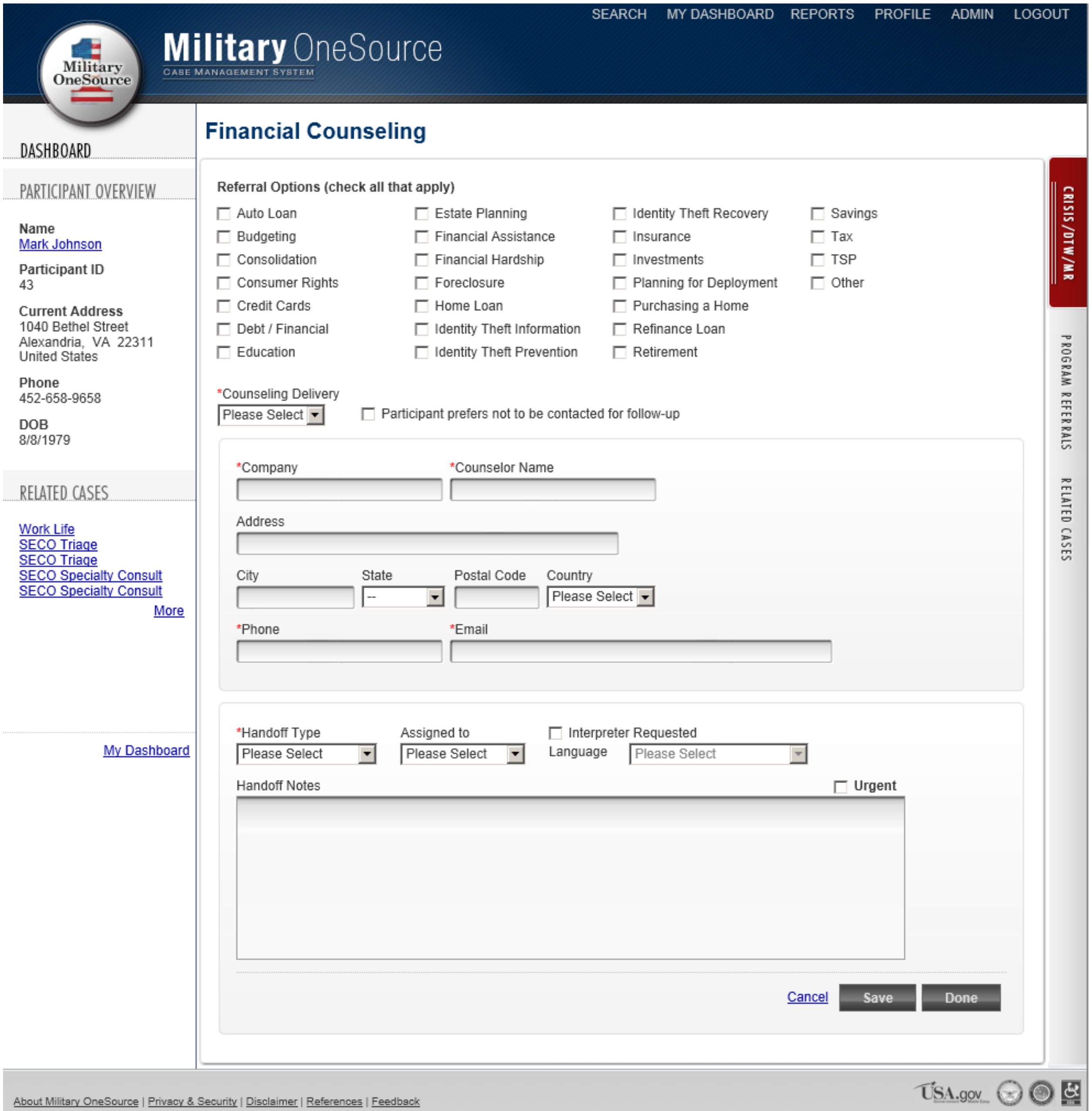


Figure 14.1

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.

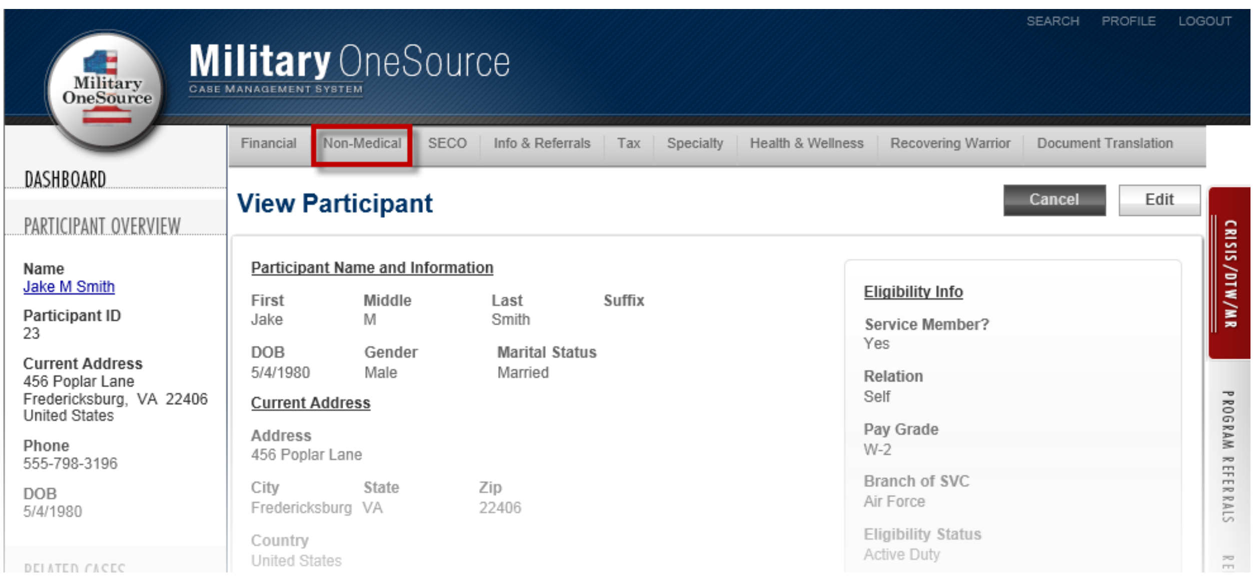


Figure 15.1

The Non-Medical Counseling referral assessment screen will display.

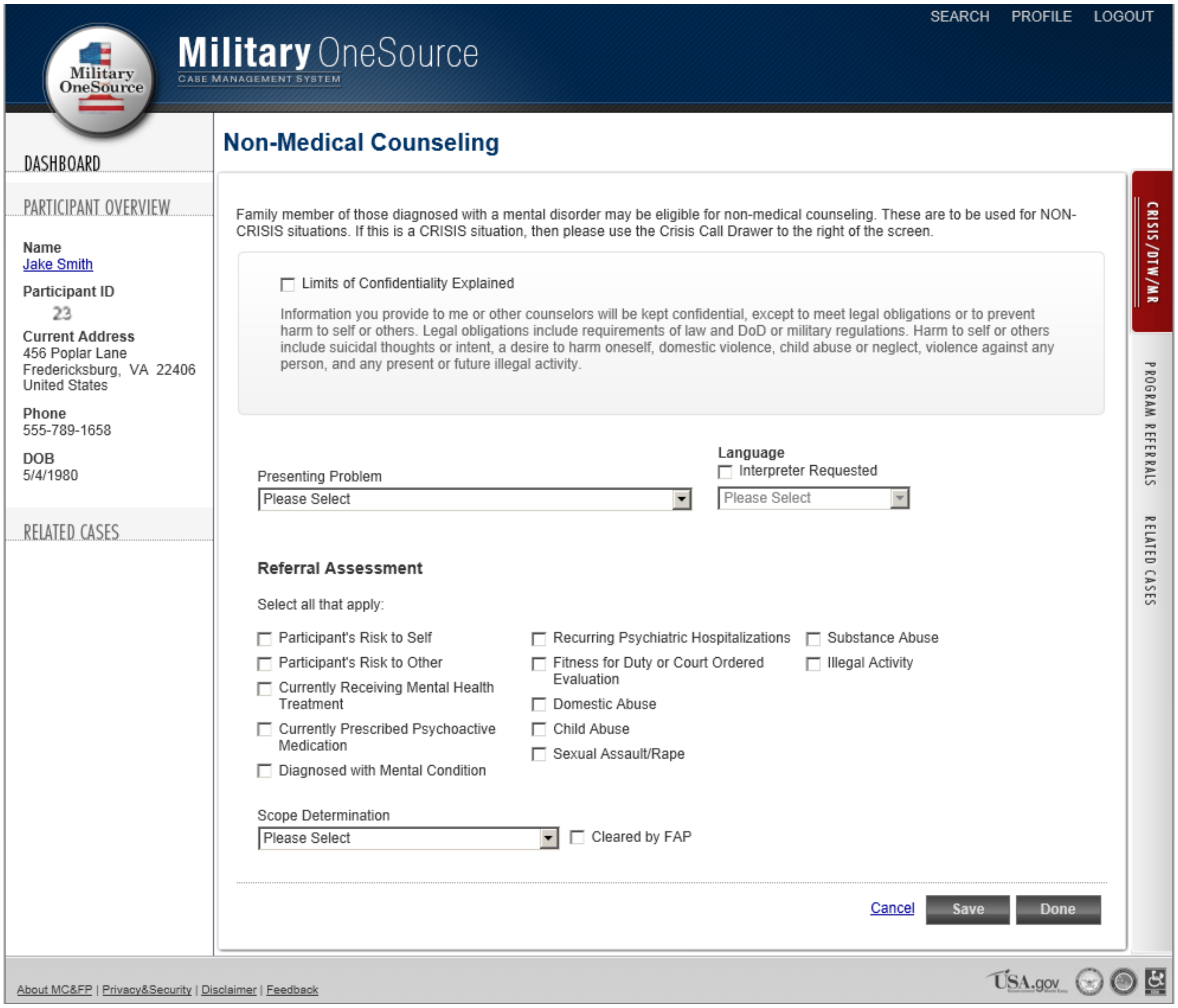


Figure 15.2

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


SEARCH PROFILE LOGOUT
Military OneSource
CASE MANAGEMENT SYSTEM
Non-Medical Counseling
DASHBOARD
PARTICIPANT OVERVIEW
Name
Jake Smith
Participant ID
23
Current Address
456 Poplar Lane
Fredericksburg, VA 22406
United States
Phone
555-789-1658
DOB
5/4/1980
RELATED CASES
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
CRISIS/DTW/MR
PROGRAM REFERRALS
RELATED CASES
About MC&FP | Privacy&Security | Disclaimer | Feedback
USA.gov

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.

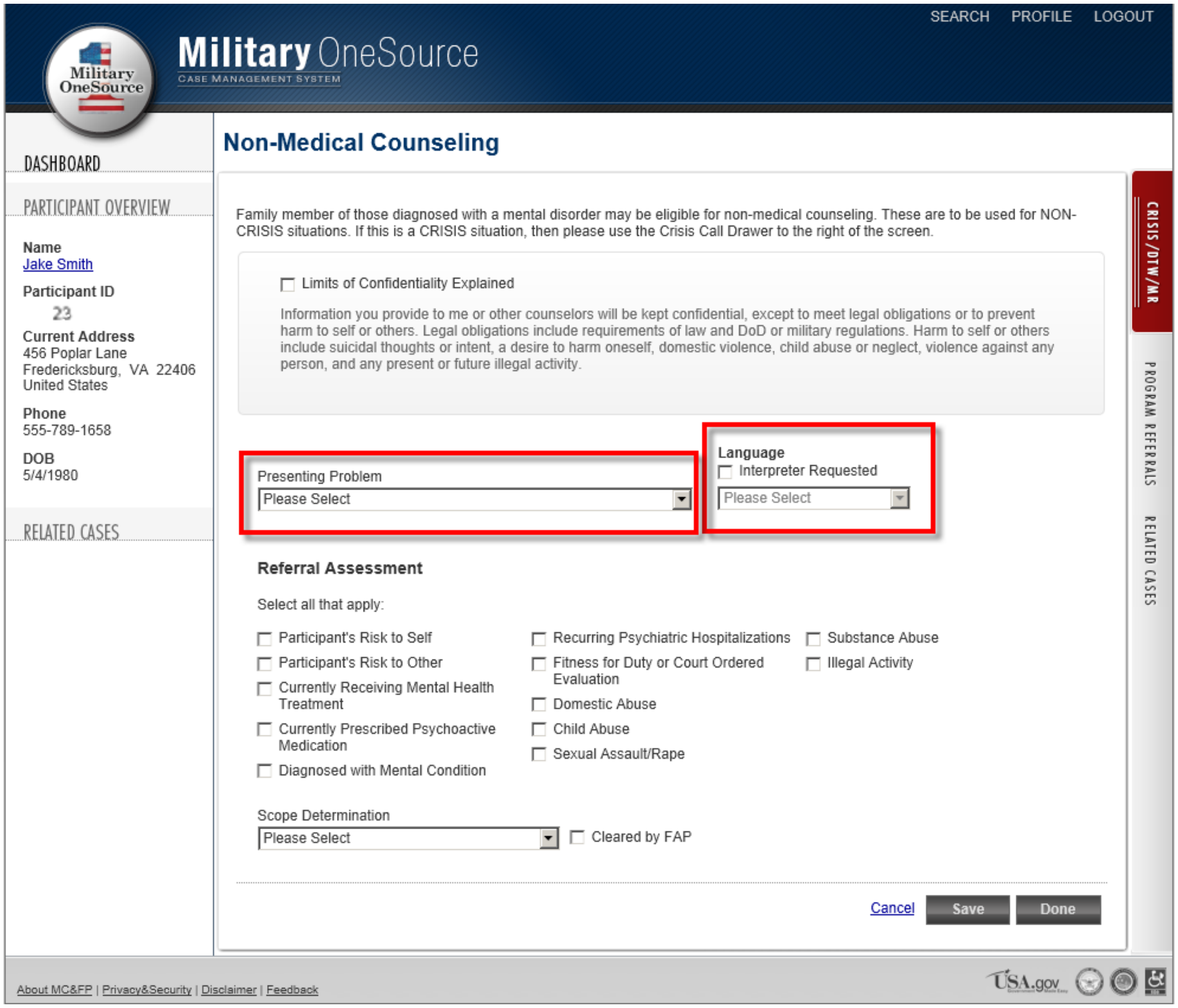
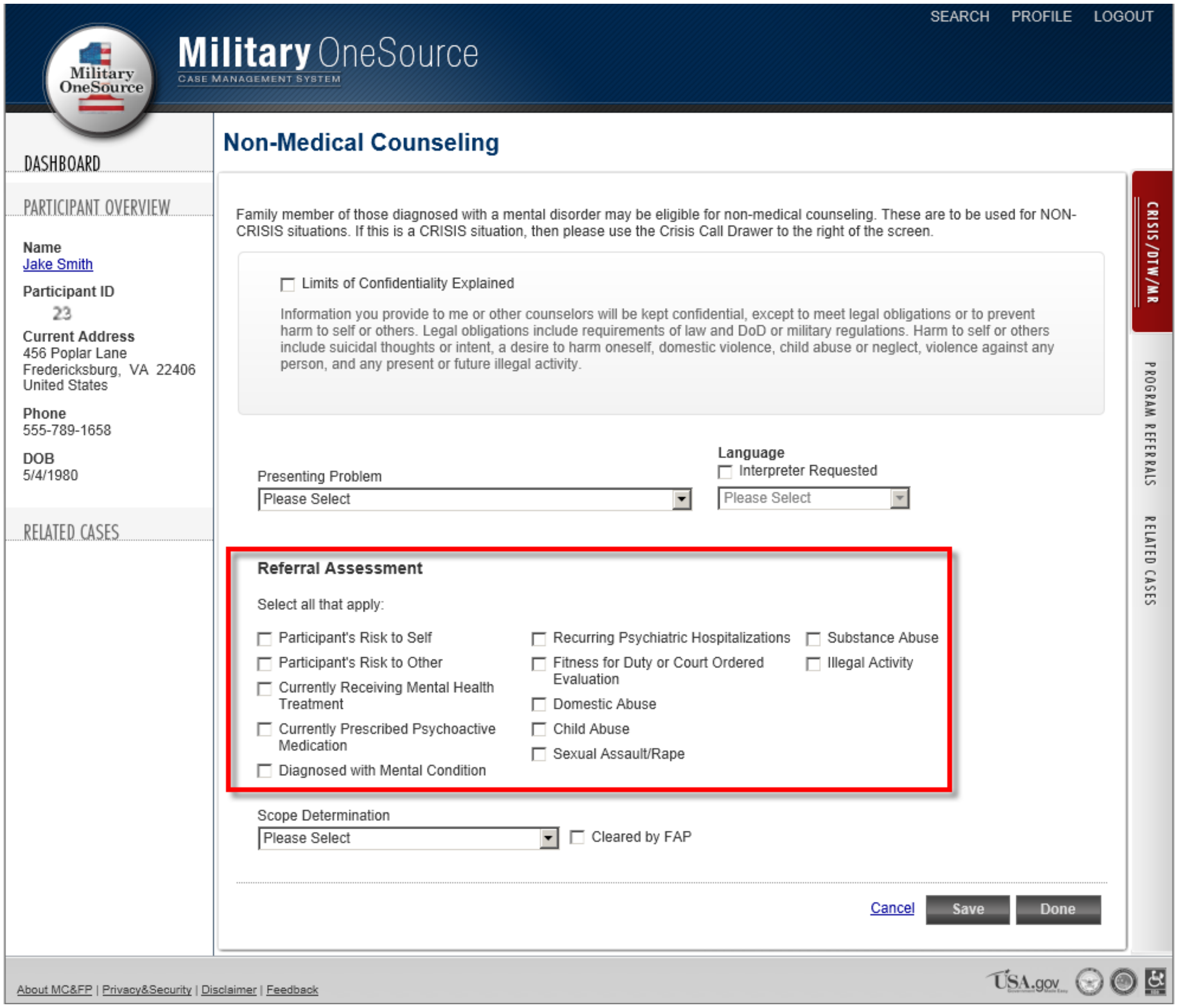


Figure 15.4

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


SEARCH PROFILE LOGOUT

Military OneSource
CASE MANAGEMENT SYSTEM

DASHBOARD

PARTICIPANT OVERVIEW

Name
Jake Smith

Participant ID
23

Current Address
456 Poplar Lane
Fredericksburg, VA 22406
United States

Phone
555-789-1658

DOB
5/4/1980

RELATED CASES

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

CRISIS/DTW/MR
PROGRAM REFERRALS
RELATED CASES

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

USA.gov

Figure 15.5

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.
6. Follow the steps below according to the scope determination selected.

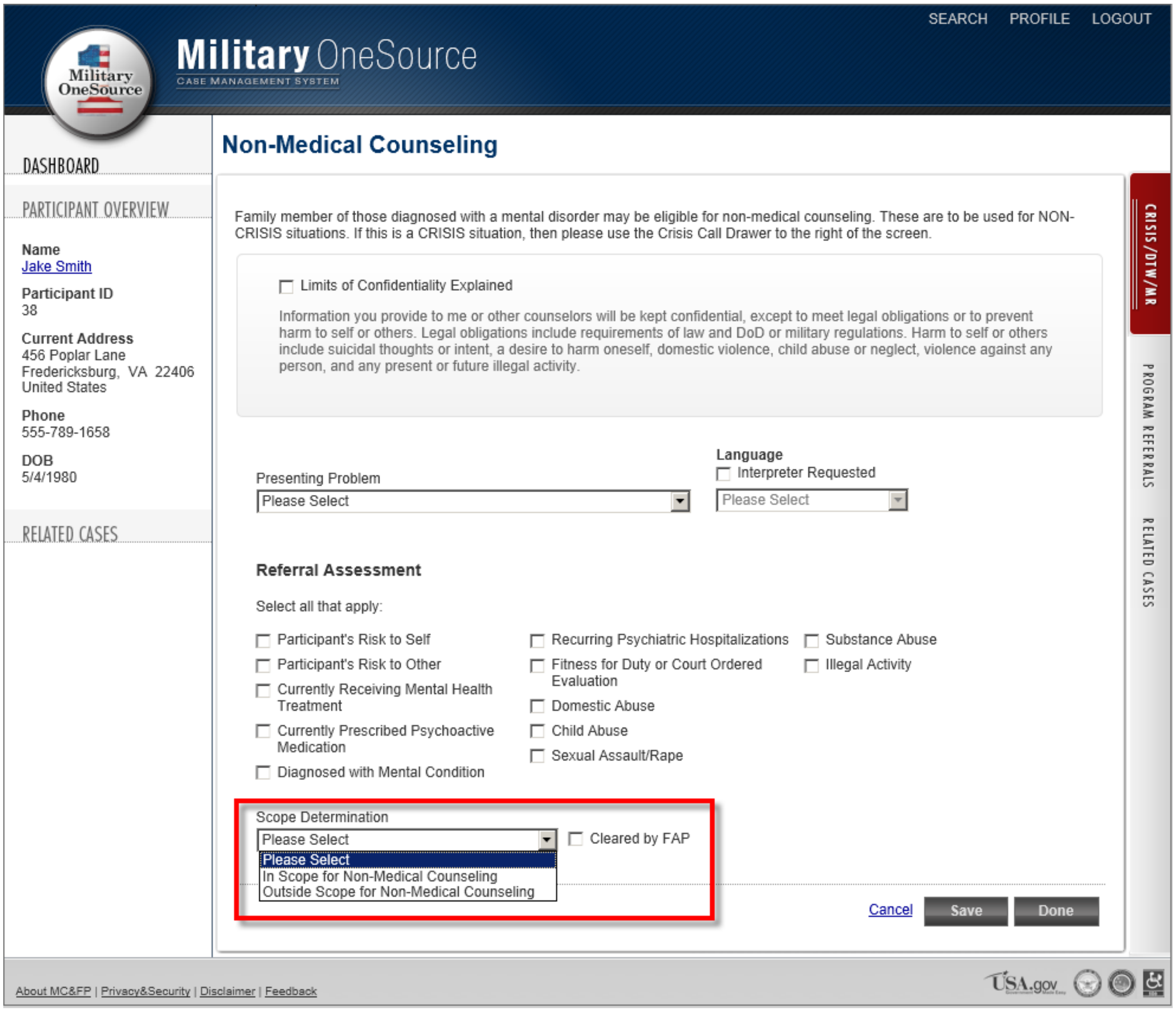


Figure 15.6

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).

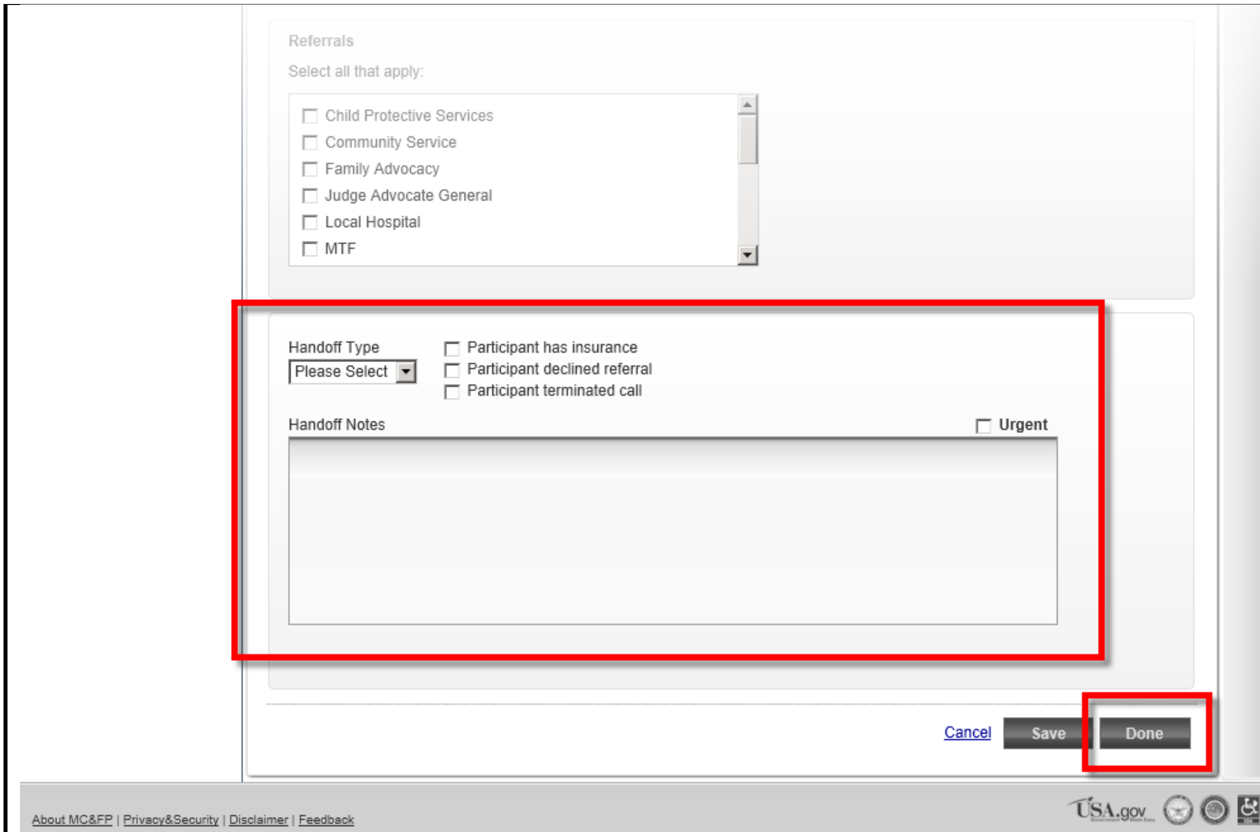


Figure 15.7

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.

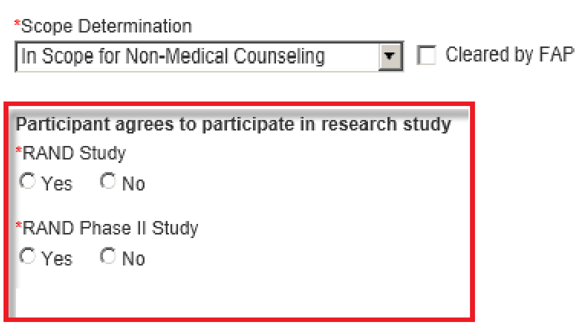


Figure 15.8

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 the 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.

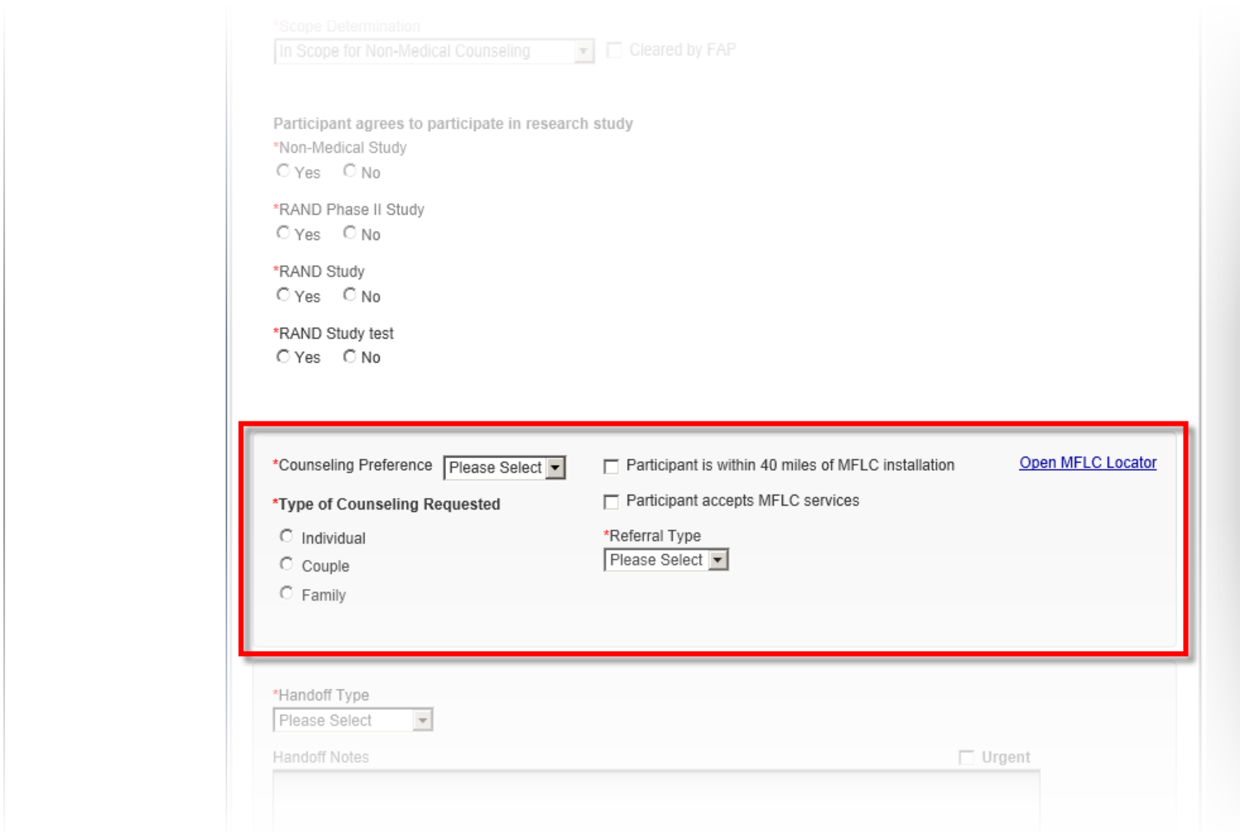


Figure 15.8

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.

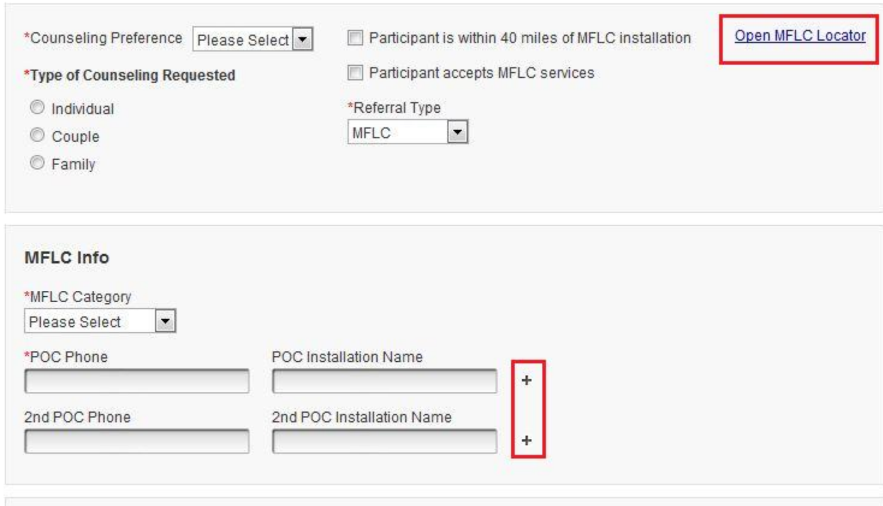


Figure 15.9

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).

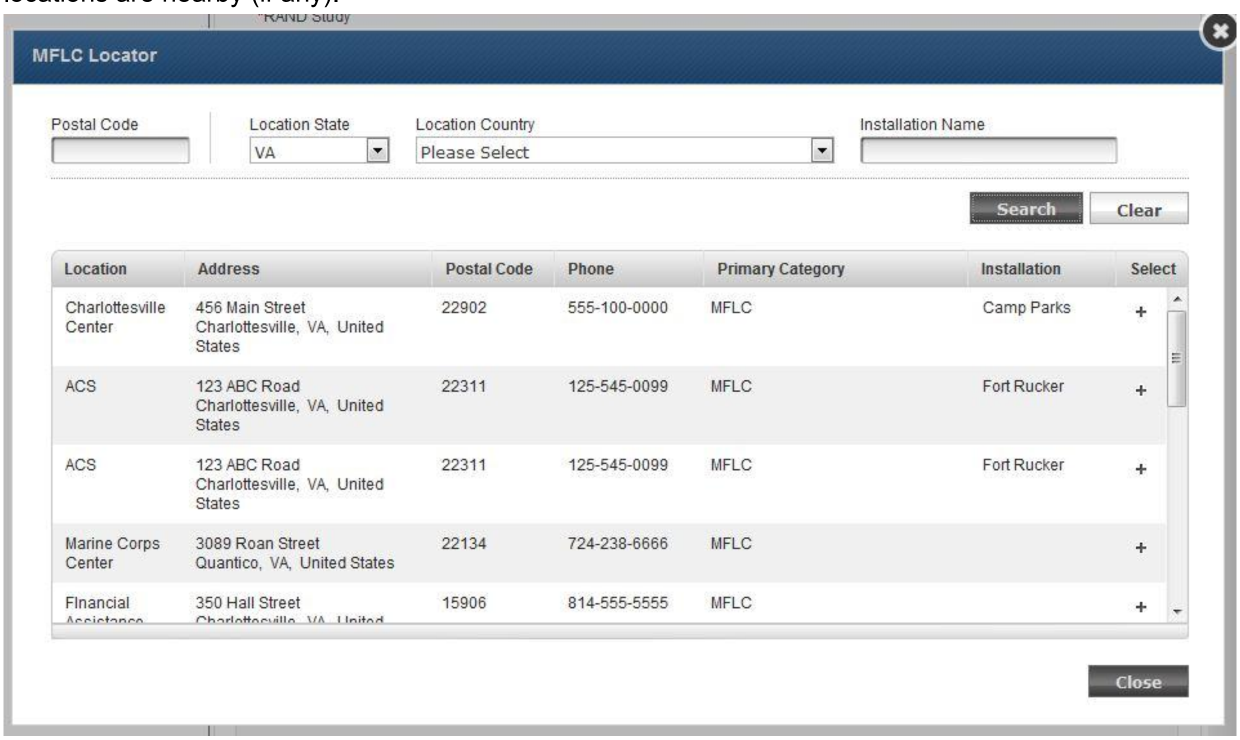


Figure 15.10

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).

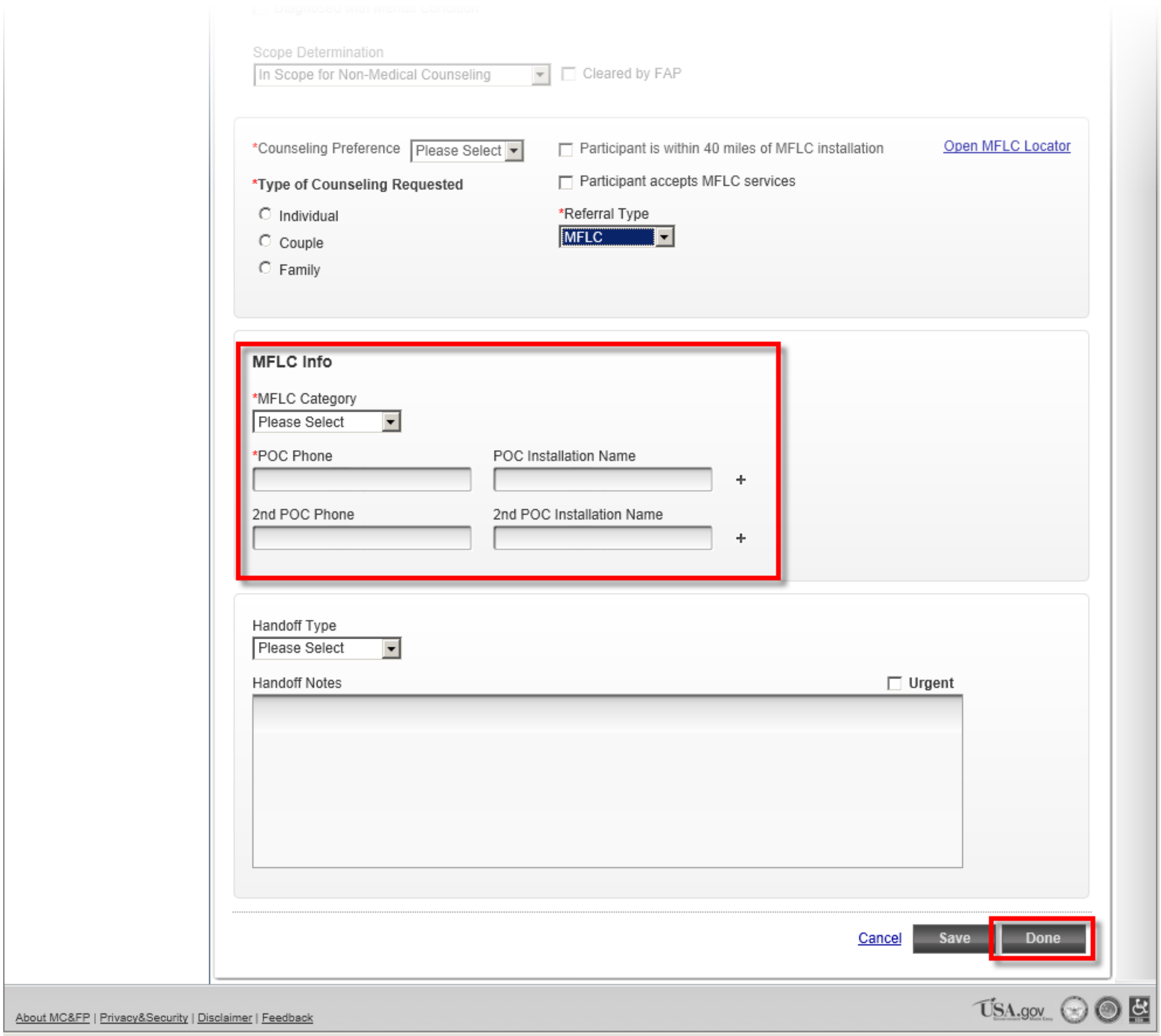


Figure 15.11

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.

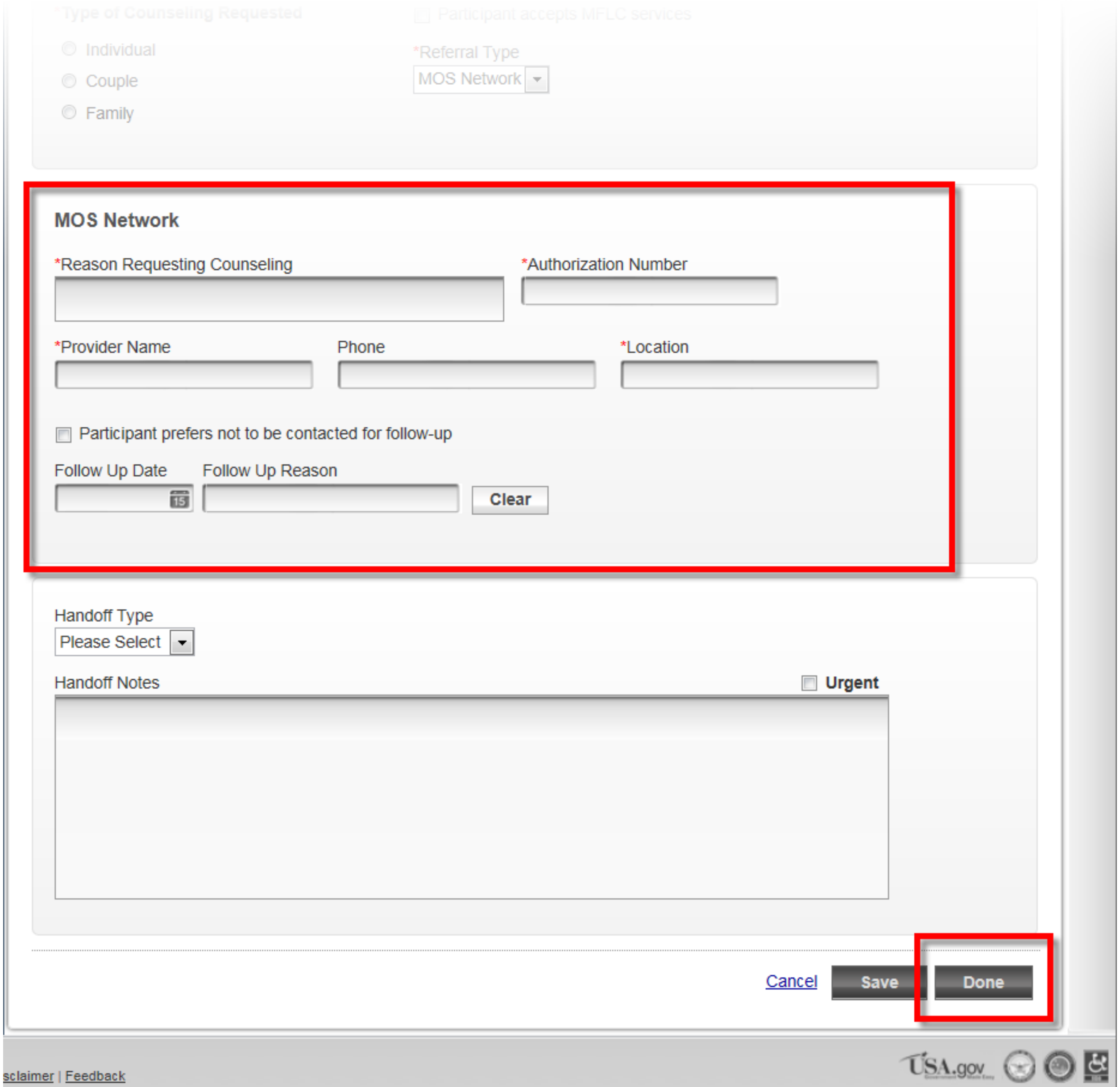


Figure 15.12

SECO

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

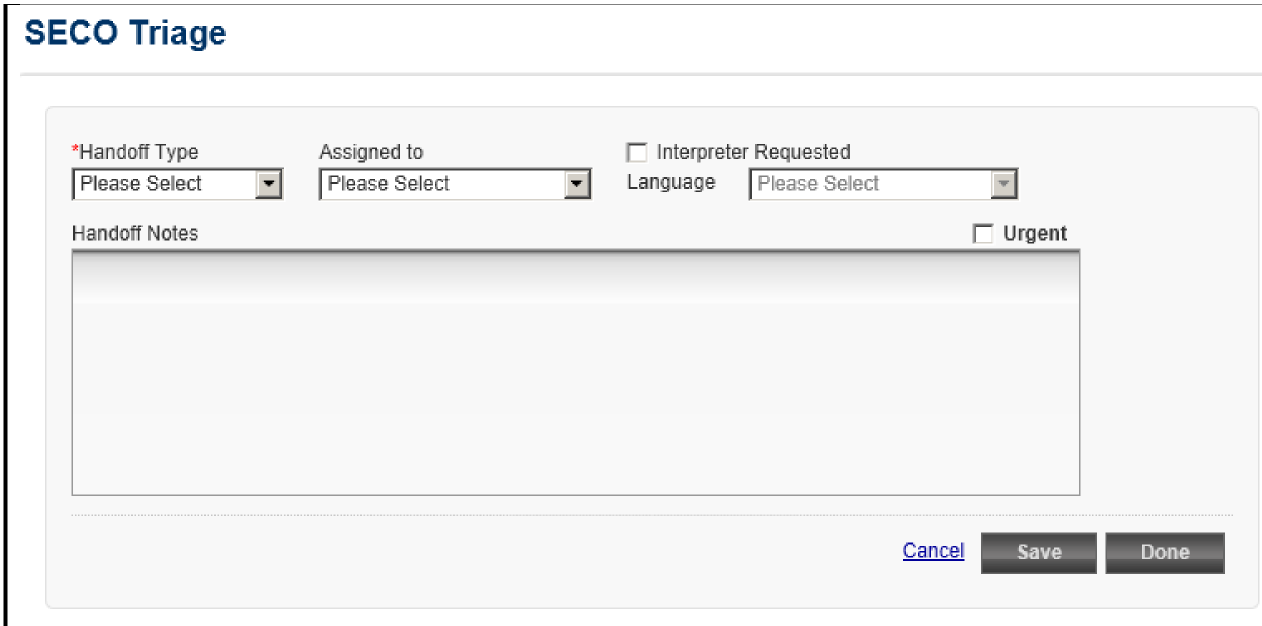


Figure 16.1

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).

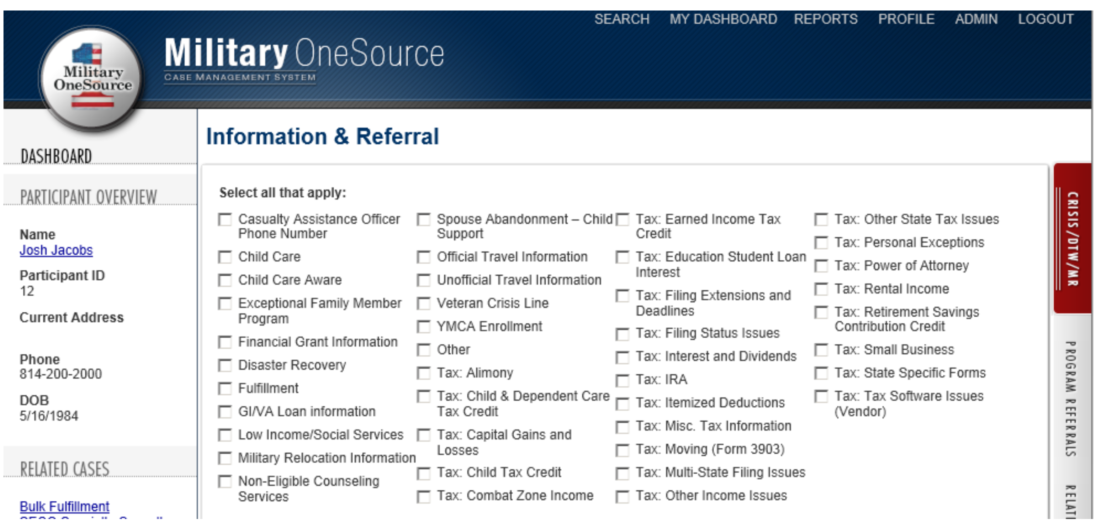


Figure 17.1

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).

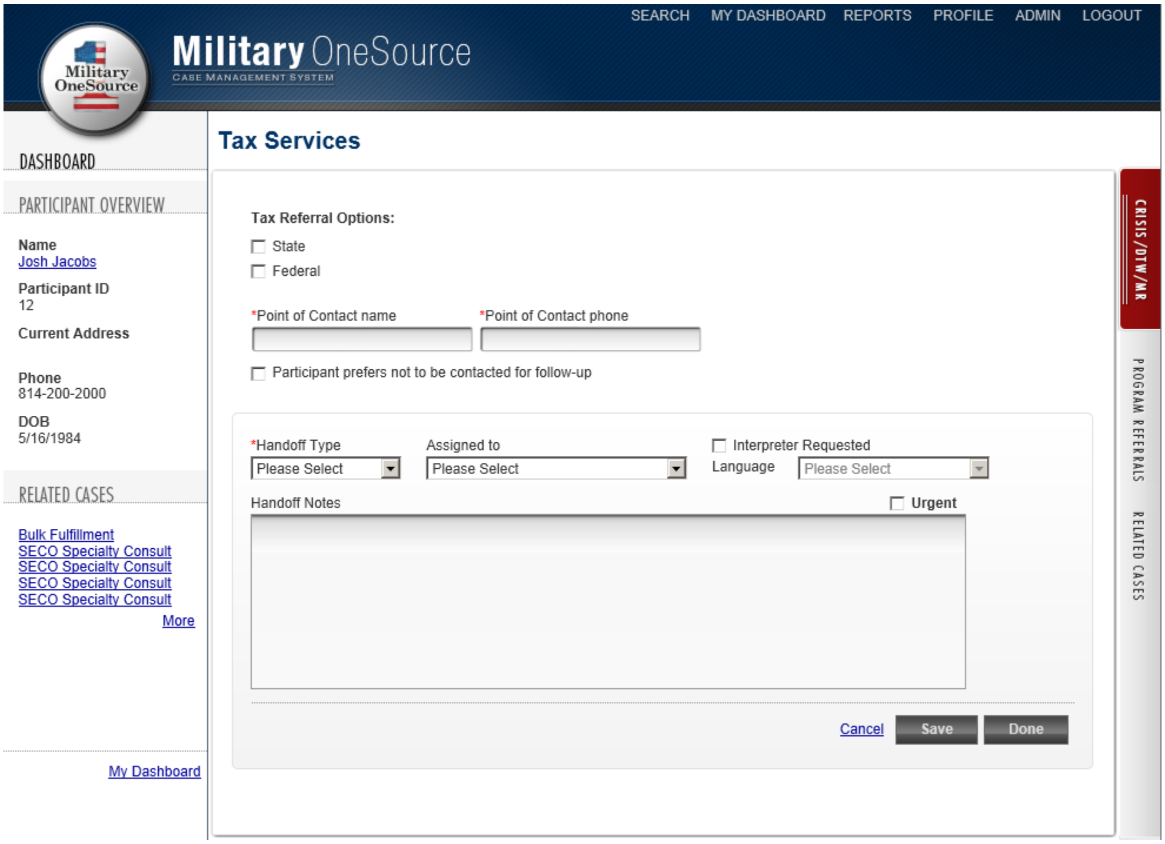


Figure 18.1

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.

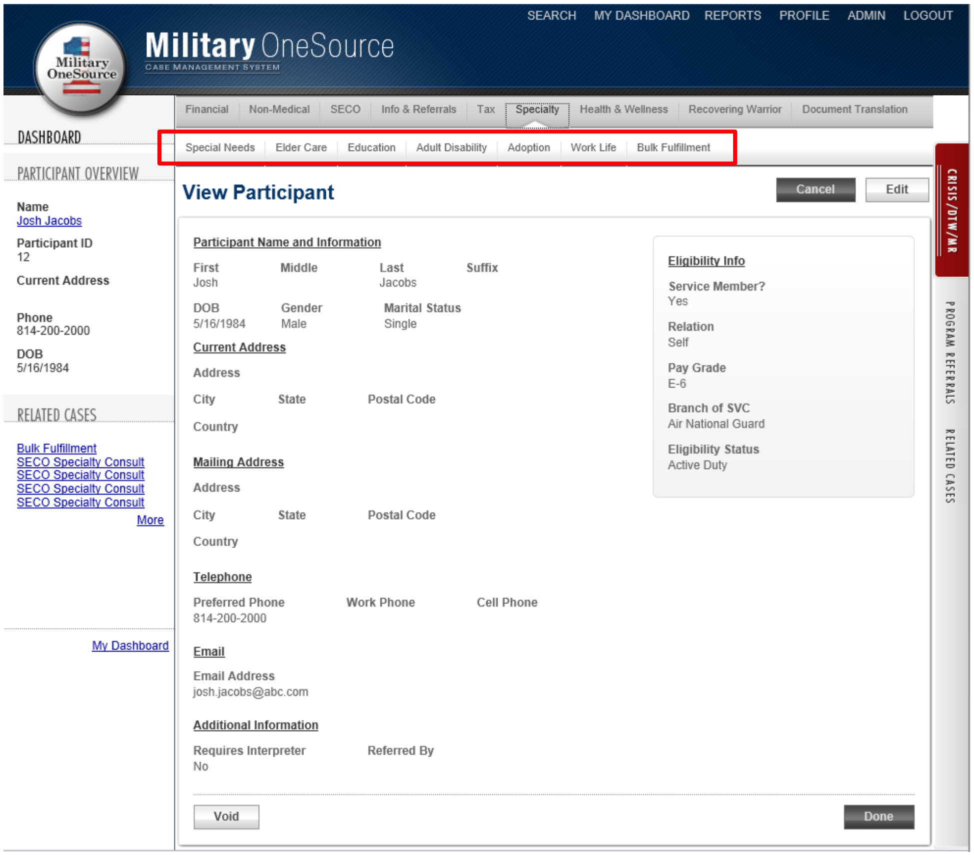


Figure 19.1

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).

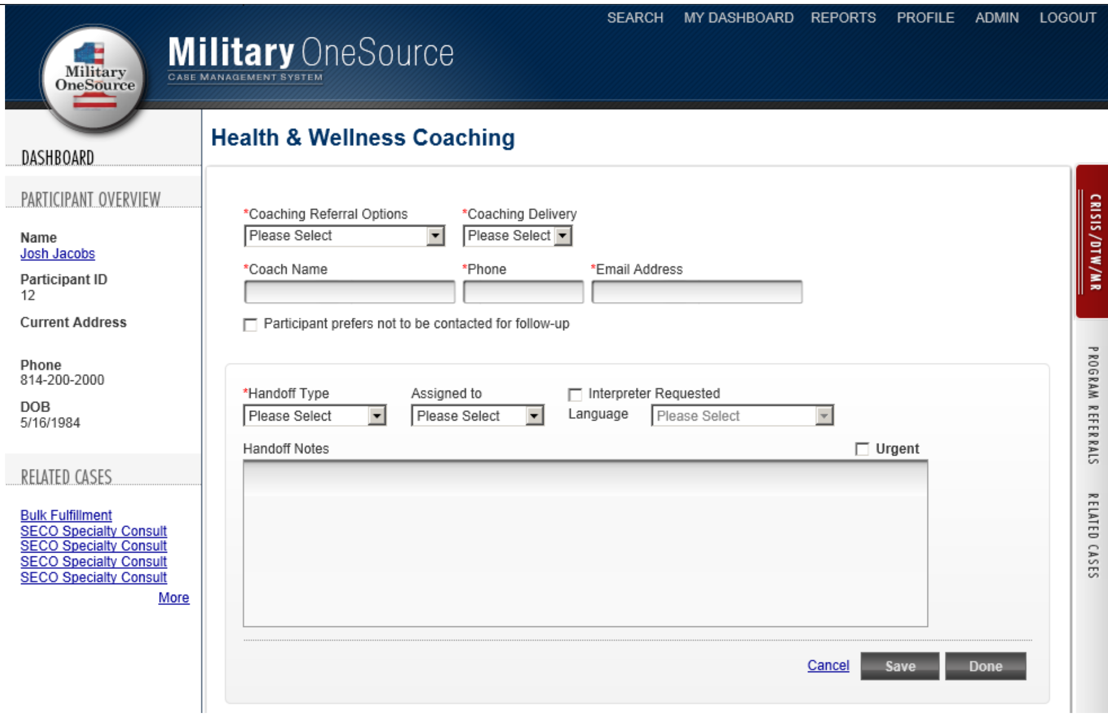


Figure 20.1

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).

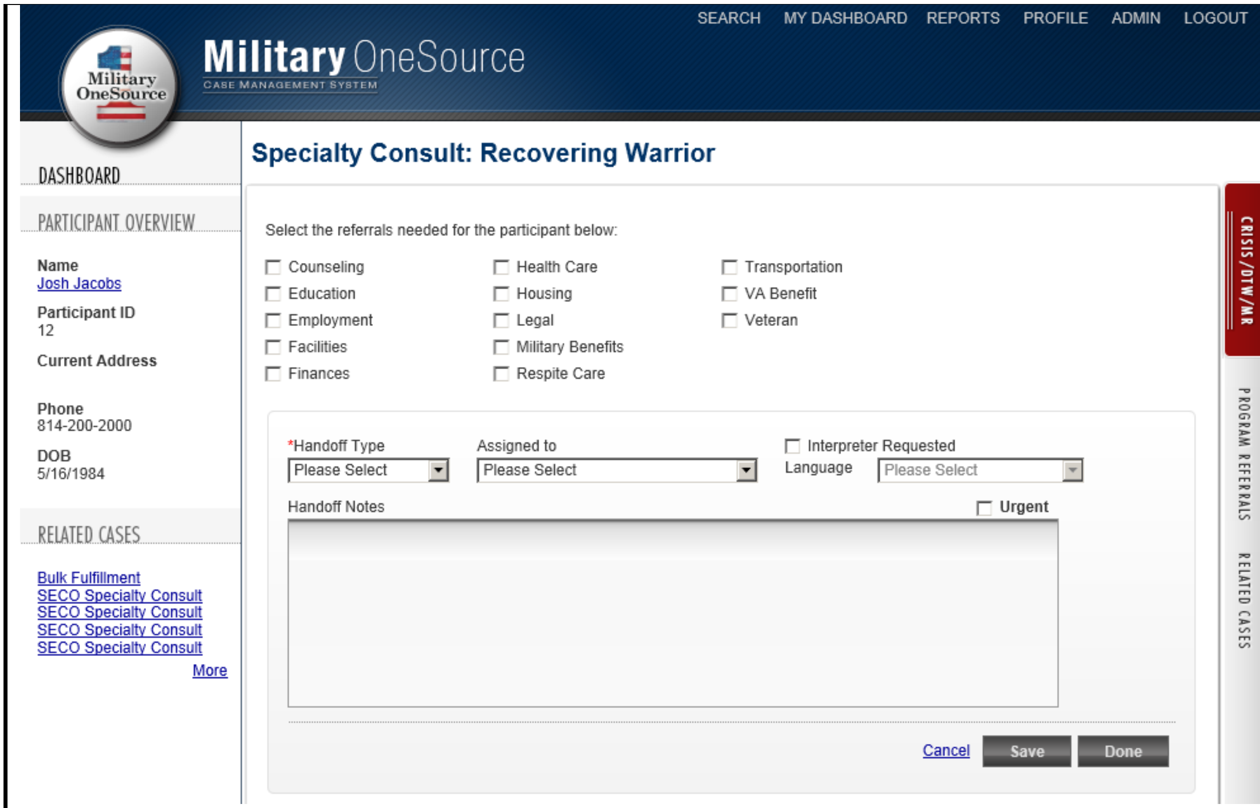


Figure 21.1

Document Translation

1. Select Document Translation

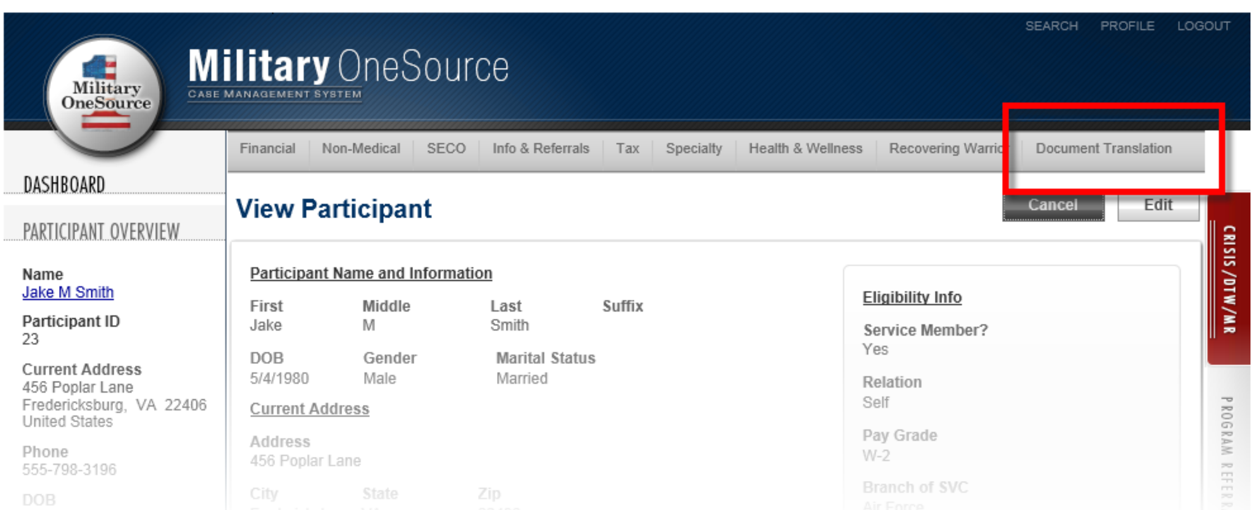


Figure 22.1

2. Enter information for the document to be translated.

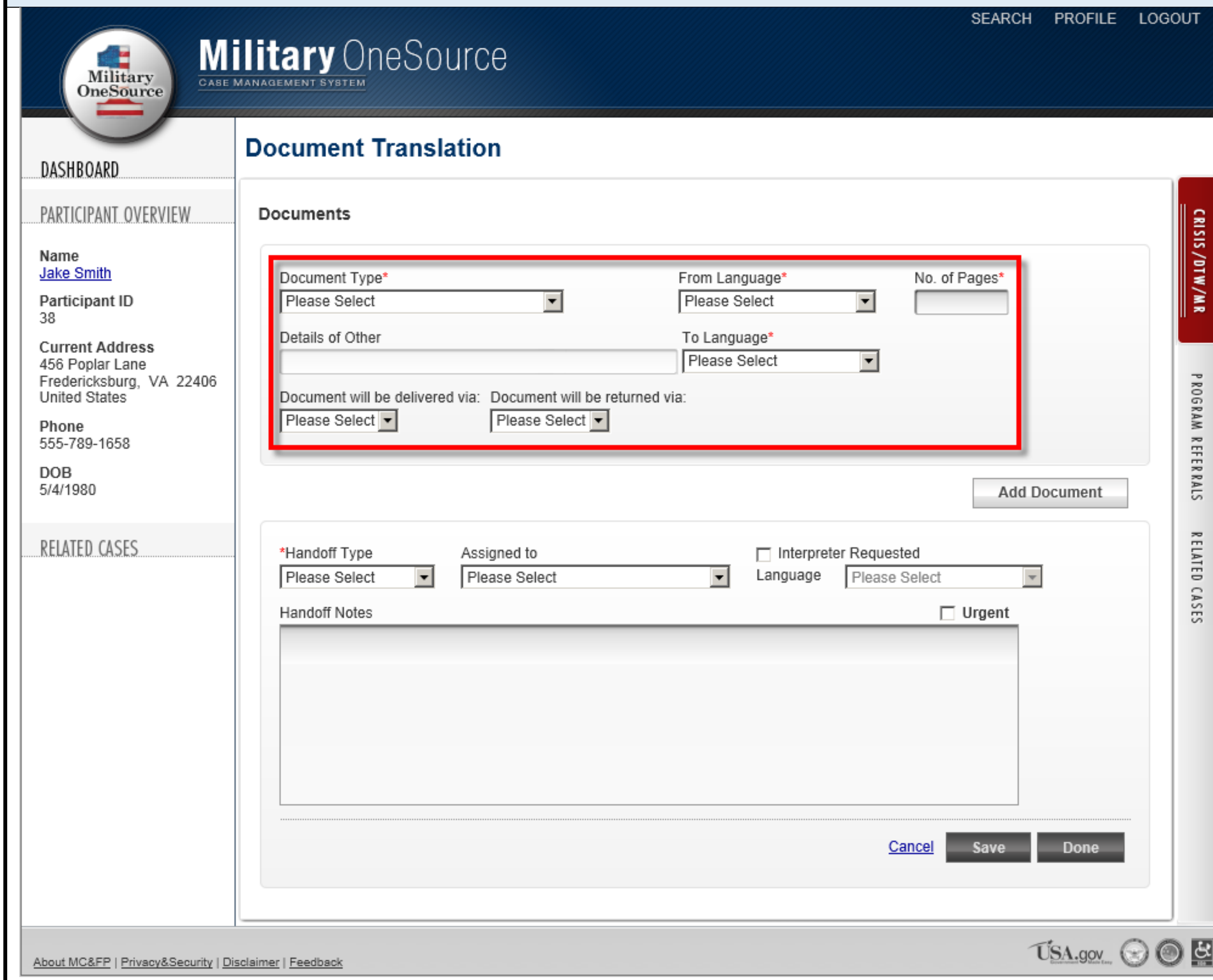


Figure 22.2

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.

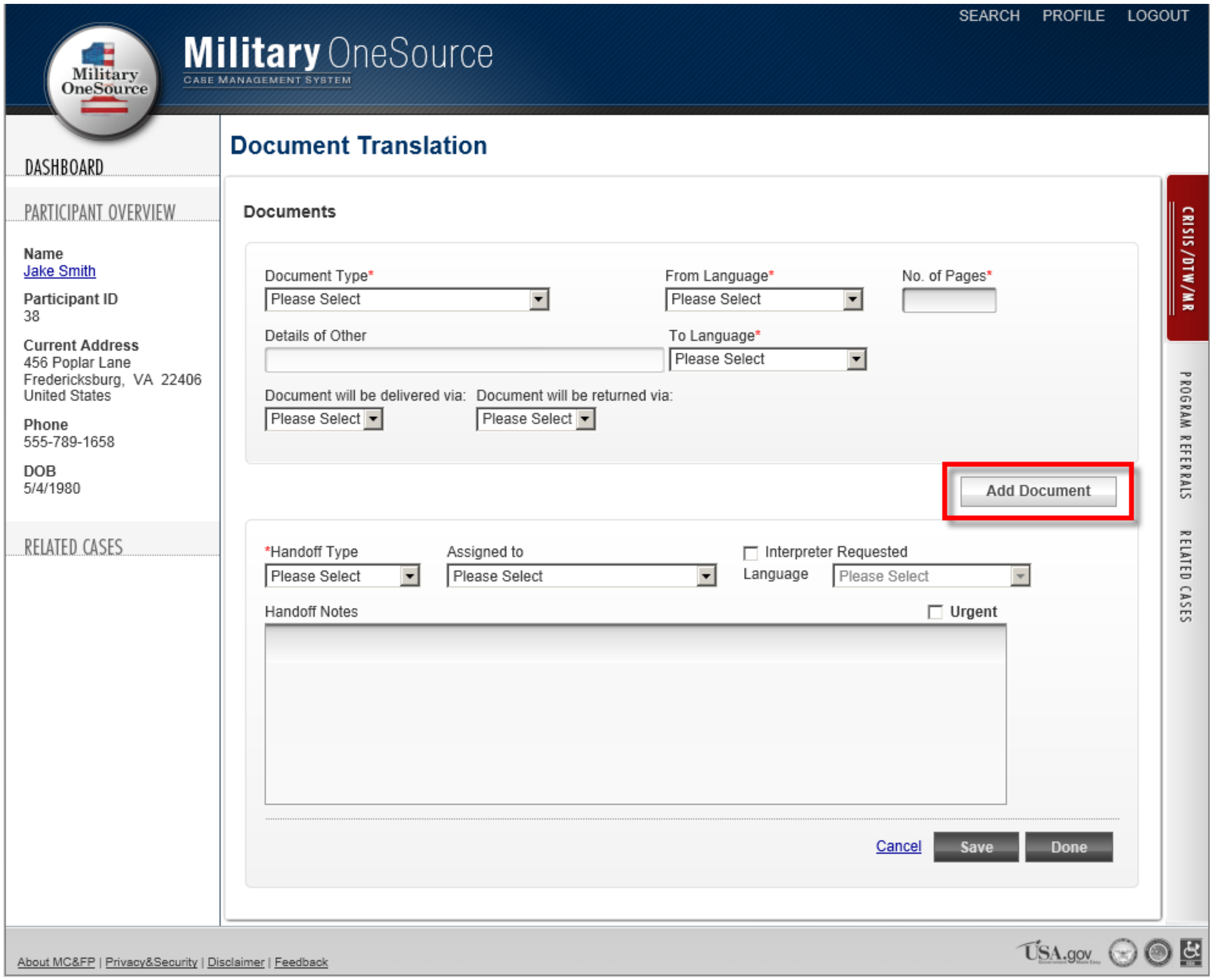

SEARCH PROFILE LOGOUT
Military OneSource
CASE MANAGEMENT SYSTEM
DASHBOARD
PARTICIPANT OVERVIEW
Name
Jake Smith
Participant ID
38
Current Address
456 Poplar Lane
Fredericksburg, VA 22406
United States
Phone
555-789-1658
DOB
5/4/1980
RELATED CASES
Document Translation
Documents
Document Type*
Please Select
From Language*
Please Select
No. of Pages*
Details of Other
To Language*
Please Select
Document will be delivered via:
Please Select
Document will be returned via:
Please Select
Add Document
*Handoff Type
Please Select
Assigned to
Please Select
Interpreter Requested
Language
Please Select
Handoff Notes
Urgent
Cancel
Save
Done
CRISIS/DTW/MR
PROGRAM REFERRALS
RELATED CASES
About MC&FP | Privacy&Security | Disclaimer | Feedback
USA.gov

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.

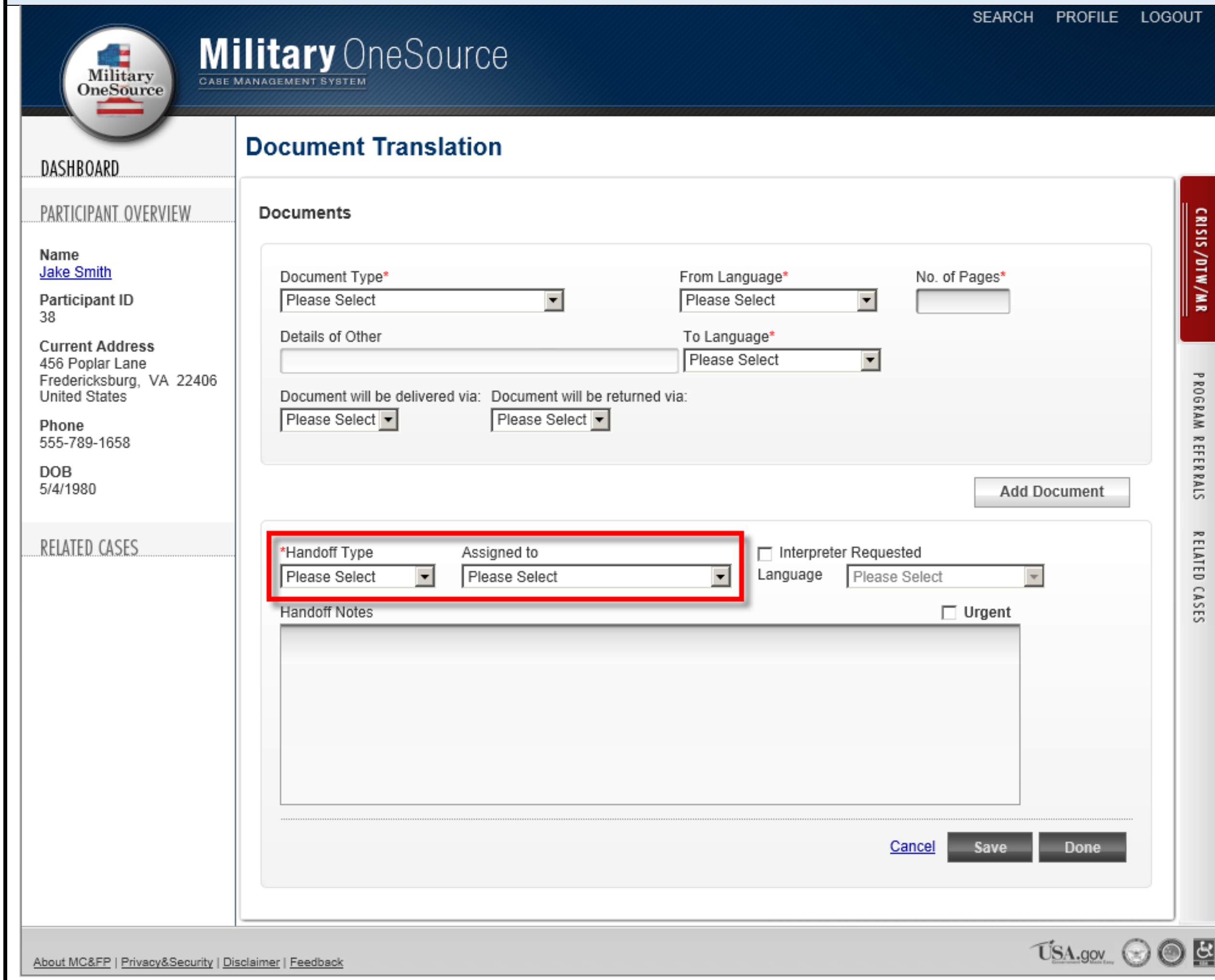


Figure 22.4

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.

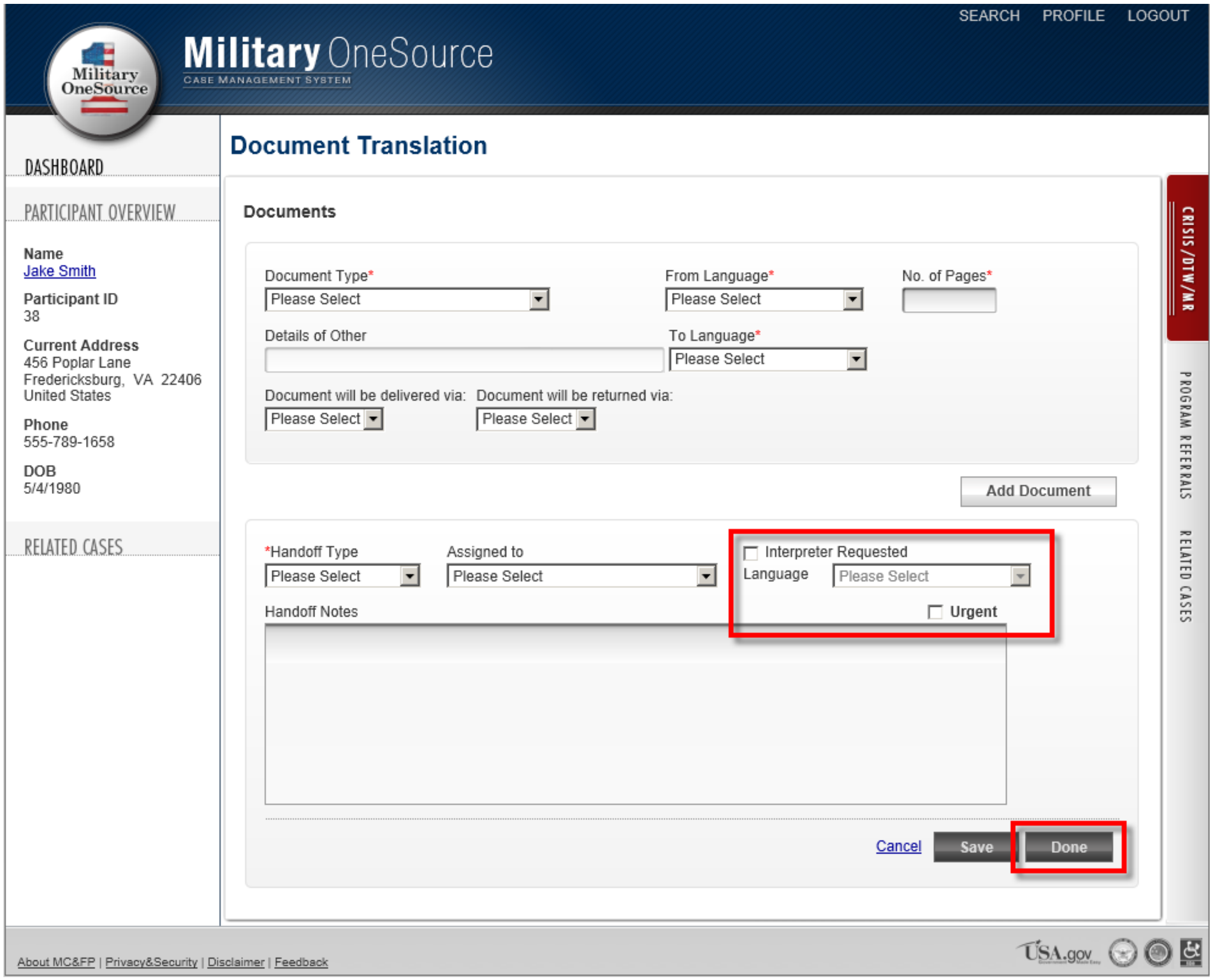


Figure 22.5

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.

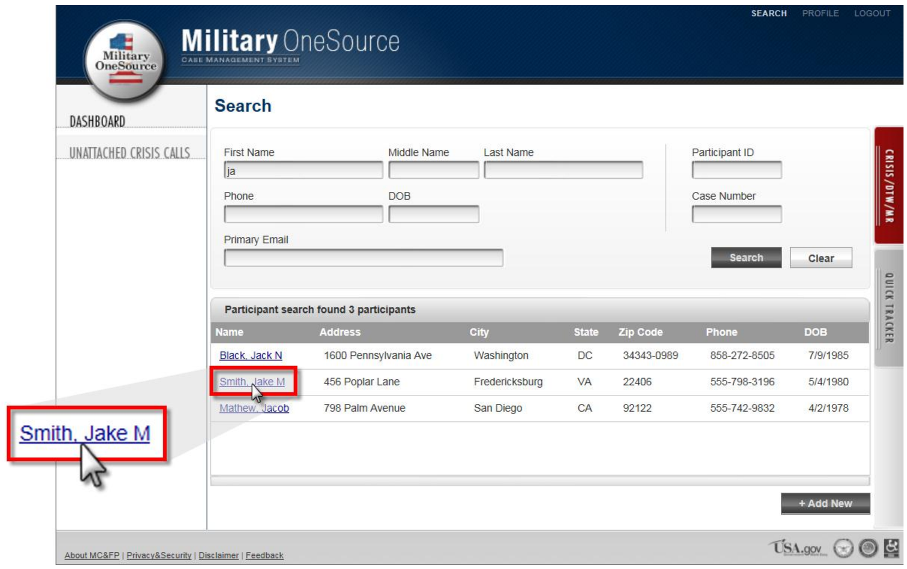


Figure 23.1

2. Click on the Related Cases tab.

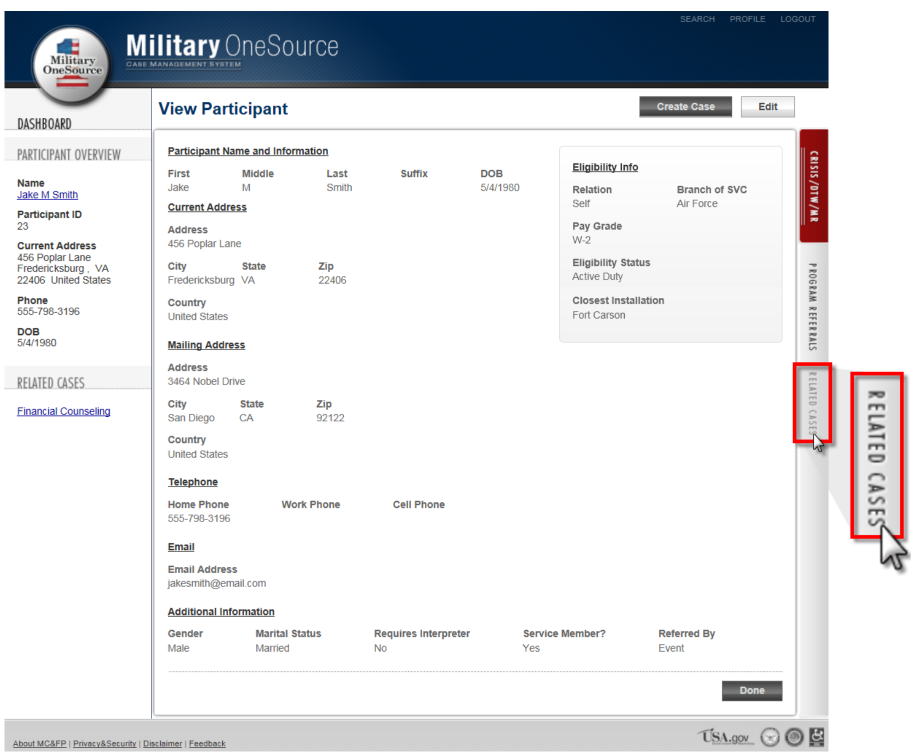


Figure 23.2

3. Select the applicable case.

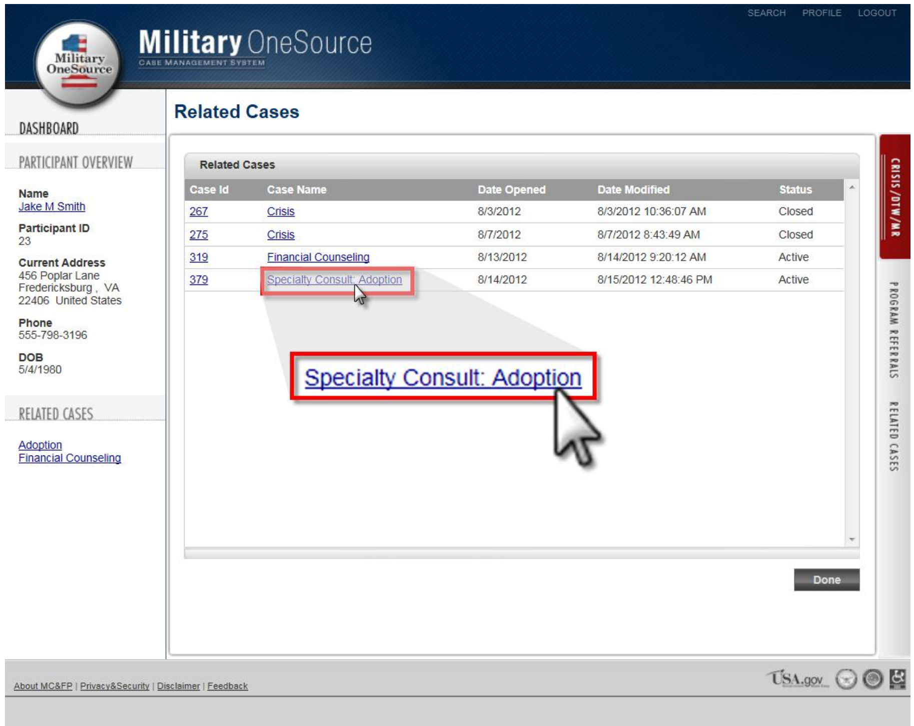


Figure 23.3

4. Click on Add Contact Note

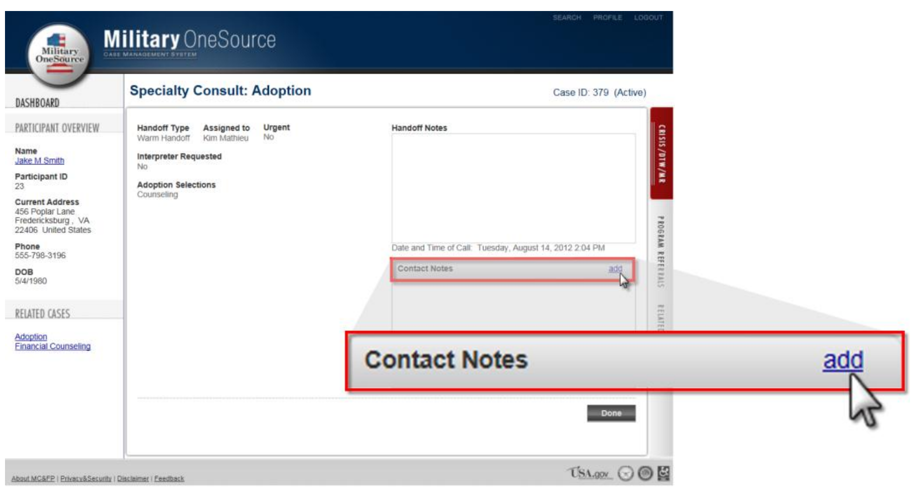


Figure 23.4

5. Enter the note's details and click Done

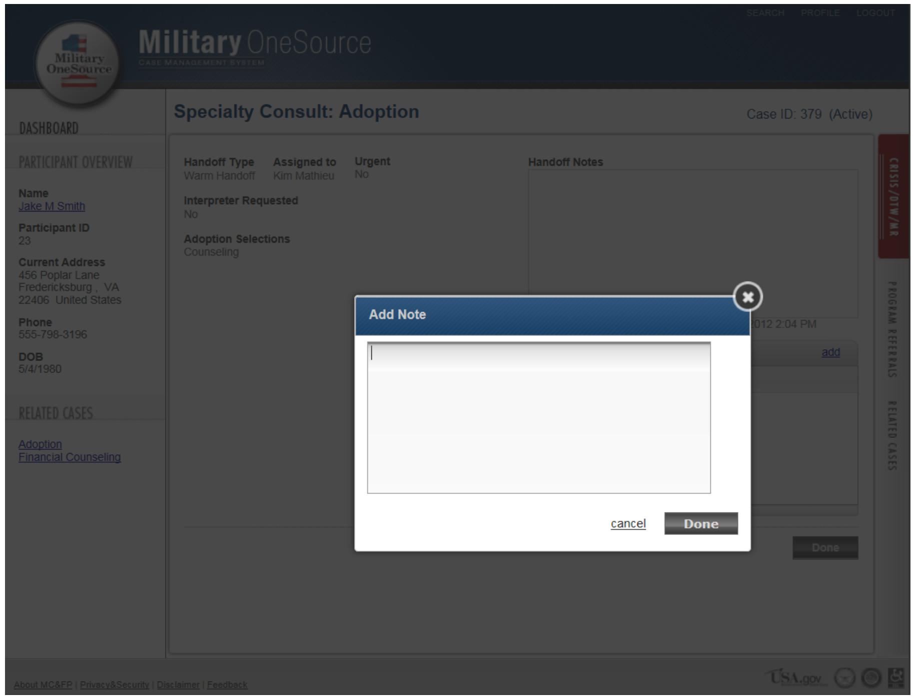


Figure 23.5

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.

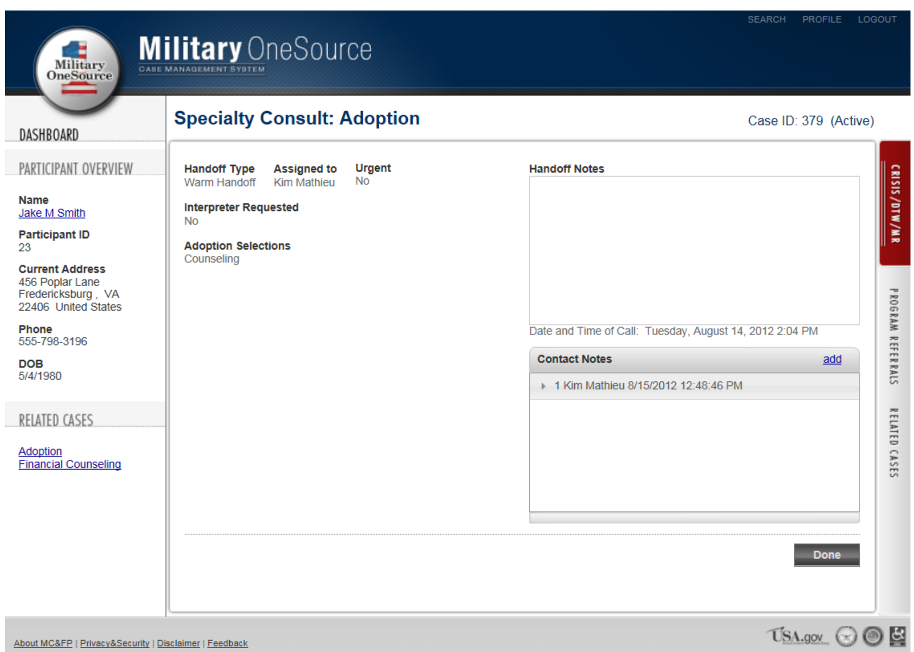


Figure 23.6