



MILITARY ONESOURCE

This guide provides instructions on viewing the Military OneSource electronic Case Management System, eCMS, demographic reports.

ELECTRONIC CASE MANAGEMENT SYSTEM

USER GUIDE

Updated September 2021



Table of Contents

- 1. Your User Account 5**
 - 1.1. Register as a User..... 5
 - 1.2. Steps to Complete Request to Replace CAC/ECA Certificate..... 6
 - 1.3. Editing Your Profile..... 6
- 2. Main Dashboard 7**
 - 2.1. Overview 7
 - 2.2. Assigned Cases 9
 - 2.3. Unassigned Cases 10
 - 2.4. Stale Cases 10
 - 2.5. Created Cases 10
 - 2.6. Assigned Calls 11
 - 2.7. Crisis Calls to Associate..... 11
 - 2.8. Follow Ups 11
 - 2.9. Expired..... 11
- 3. Supervisor Case Management Dashboard 12**
 - 3.1. Overview12
 - 3.2. Accessing the Case Management Dashboard12
 - 3.3. Filters.....13
 - 3.4. Result Set14
 - 3.5. Bulk Assigning.....15
- 4. Search 16**
 - 4.1. Search for a Participant16
 - 4.2. Search for a Parent/Guardian 18
 - 4.3. Search for Service Provider21
 - 4.4. Search for a Case 22
- 5. Working With Participant Records24**
 - 5.1. Overview24
 - 5.2. Create a Participant 24
 - 5.3. View and Edit a Participant 30



6. Working With Minor Participants and Parent/Guardian Records 32

- 6.1. Overview 32**
- 6.2. Viewing Minor Participant Details 32**
- 6.3. Search for Parent/Guardian 34**
 - 6.3.1. Using Search Screen. 34
 - 6.3.2. From Minor Participant Details. 34
- 6.4. Create Parent/Guardian for Minor Participant 37**
- 6.5. Associate Existing Parent/Guardian With Minor Participant 40**
- 6.6. Working With the Parent/Guardian Information Container 42**
 - 6.6.1. View Associated Parent/Guardians 42
 - 6.6.2. Edit Associated Parent/Guardians 43
 - 6.6.3. Remove Association With Parent/Guardian 45
- 6.7. Understanding Parent/Guardian Association History 47**

7. Creating Cases 49

- 7.1. Overview 49**
- 7.2. Create a Crisis Case 50**
 - 7.2.1. Attaching a Participant to a Crisis Case 52
 - 7.2.2. Unattached Crisis Calls 54
- 7.3. Create a Non-Medical Counseling Case 54**
 - 7.3.1. Create an Outside Scope for Non-Medical Counseling Case 58
 - 7.3.2. Create an In Scope for Non-Medical Counseling Case 60
- 7.4. Create a SECO Triage Case. 64**
- 7.5. Create a SECO Specialty Consult and/or Spouse Group (Coming Soon) Case 67**
- 7.6. Create a Document Translation Case 71**
- 7.7. Create Other Case Types 75**
- 7.8. Accessing Participant's Existing Cases 78**

8. Managing Cases and Sessions 82

- 8.1. Overview 82**
- 8.2. Manage Non-Medical Counseling Cases 82**
- 8.3. Manage SECO Specialty Consult and SECO Spouse Group Cases. 95**
- 8.4. Manage Document Translation Cases 97**
- 8.5. Manage Consultation-Based Cases 99**
- 8.6. Manage Work Life Cases With Sessions 103**
- 8.7. Manage Case Types Without Sessions. 107**
- 8.8. Notes Feature 110**

9. Other Incoming Calls 117

- 9.1. Quick Tracker. 117**
- 9.2. Contact Notes 118**
- 9.3. Administrative Notes 120**



| | |
|---|------------|
| 10. Reports | 123 |
| 10.1. Overview | 123 |
| 10.2. List Reports | 124 |
| 10.3. Summary Reports | 124 |
| 10.4. Dimensional Aggregate Reports | 124 |
| 11. Admin | 125 |
| 11.1. Overview | 125 |
| 11.2. User Manager | 125 |
| 11.2.1. Overview | 125 |
| 11.2.2. Invite a New User to Register | 125 |
| 11.2.3. Resend Invitation | 130 |
| 11.2.4. Editing a User Account | 130 |
| 11.2.5. How to Assist User With Replacing Their CAC/ECA Certificate | 131 |
| 11.2.6. How to Disable a User | 133 |
| 11.3. List Management | 134 |
| 11.3.1. Overview | 134 |
| 11.3.2. Managing Lists | 135 |
| 11.4. File Manager | 137 |
| 11.5. Case Studies | 140 |
| 11.6. References and Training | 141 |
| 11.6.1. Overview | 141 |
| 11.7. Technical Support Feedback | 141 |
| 11.7.1. Overview | 141 |
| 11.8. Role Management | 142 |
| 11.8.1. Warning | 142 |
| 11.8.2. Managing Roles | 142 |
| 12. Requesting Support | 145 |



1. Your User Account

1.1. Register as a User

To register in the electronic Case Management System, or eCMS, you must first have a valid CAC/ECA certificate installed on your computer. Your supervisor must also submit paperwork for an invitation to register in the application to be sent to you.

If you do not see the invitation email in your inbox, you will need to check your spam/junk folders. Open the email and click the link "Click Here to Register."

Your browser will ask you to select your cert and enter your password. You will then be taken to the login page. You will no longer need the link from the email. In the future, go to the eCMS to reach the Login screen.

After reviewing the security warning, you just click the "Login" button to enter [the eCMS](#) and go to your [dashboard](#).

Case Management System

*** Security Warning ***

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

- The USG routinely intercepts and monitors communications on this IS for purposes including, but not limited to, penetration testing, COMSEC monitoring, network operations and defense, personnel misconduct (PM), law enforcement (LE), and counterintelligence (CI) investigations.
- At any time, the USG may inspect and seize data stored on this IS.
- Communications using, or data stored on, this IS are not private, are subject to routine monitoring, interception, and search, and may be disclosed or used for any USG-authorized purpose.
- This IS includes security measures (e.g., authentication and access controls) to protect USG interests—not for your personal benefit or privacy.
- Notwithstanding the above, using this IS does not constitute consent to PM, LE or CI investigative searching or monitoring of the content of privileged communications, or work product, related to personal representation or services by attorneys, psychotherapists, or clergy, and their assistants. Such communications and work products are private and confidential.

Use of this system constitutes consent to monitoring for all lawful purposes.

By clicking the Login button, you agree to comply with the terms listed above.



Figure 1



1.2. Steps to Complete Request to Replace CAC/ECA Certificate

If you receive a new CAC/ECA cert, you must register it with the eCMS once it is installed on your computer. You can begin this process by clicking the “Feedback” link in the footer, completing and submitting the form.

You will receive an email from the system within the next day or two. If you do not see the email in your inbox, you will need to check your spam/junk folders. Open the email and click the link “Click Here to replace your CAC/ECA certificate within the CMS application.” Your browser will ask you to select your cert. Be sure you are selecting your new cert, then enter your password. You will be taken to the login page. You will no longer need the link from the email. In the future, go to [the eCMS](#) to reach the login screen.

Click the “Login” button to enter [the eCMS](#) and be taken to your [dashboard](#).

1.3. Editing Your Profile

You can edit your name or email address at any time by clicking the “Profile” link in the main navigation bar.

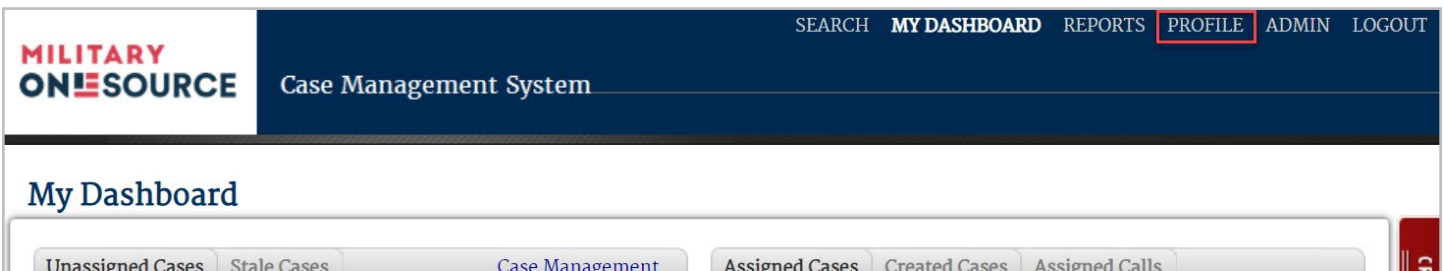


Figure 2

Simply make your changes and click “Submit” to save.



2. Main Dashboard

2.1. Overview

Your Dashboard is divided into four quadrants with one or more tabs. From anywhere in the system, you can access the dashboard using the “My Dashboard” link at the top of the screen.



Figure 3

You can click any “Case ID” or “Case Type” link to go directly to that case, or the “Participant” name to go directly to the [Participant record](#).

My Dashboard

Unassigned Cases | Stale Cases | Case Management

| Case ID | Case Type | Participant | Date Modified |
|------------------------|--------------------------------------|-----------------------------|---------------|
| 984795 | ! Special Needs | Jo Zee | 1/22/2021 |
| 717277 | Financial Counseling | Michael | 9/20/2012 |
| 707360 | Financial Counseling | Marissa | 10/21/2012 |
| 718032 | Financial Counseling | kKOGV BfEdU | 11/5/2012 |
| 924261 | Financial Counseling | Geri | 11/6/2012 |

Assigned Cases | Created Cases | Assigned Calls

| Case ID | Case Type | Participant | Date Created |
|------------------------|--|---------------------------|--------------|
| 984527 | Non-Medical Counseling | Jo Zee | 12/23/2020 |
| 980142 | SECO Triage | Stephanie | 10/28/2020 |
| 980108 | SECO Triage | Rogue | 10/27/2020 |
| 980101 | SECO Triage | Rogue | 10/27/2020 |
| 980080 | SECO Triage | Hulk | 10/27/2020 |
| 980079 | SECO Triage | Hulk | 10/27/2020 |

Crisis Calls to Associate

| Case ID | Caller | Date Created | Consultant |
|------------------------|---------------------------|--------------|------------|
| 984764 | Jo Zee | 2/3/2021 | , |
| 984763 | zpxUJJ.Ry | 2/3/2021 | , |
| 984761 | Jo Zee | 2/3/2021 | , |
| 984760 | bette zee | 2/3/2021 | , |
| 984759 | bo duke | 2/3/2021 | , |
| 984758 | Jo Zee | 2/3/2021 | , |
| 984743 | | 1/29/2021 | , |

Follow Ups | Expired

| Case ID | Case Type | Participant | Follow Up |
|------------------------|--|------------------------|-----------|
| 984527 | Non-Medical Counseling | Jo Zee | 1/25/2021 |

Figure 4



Scrolling to the bottom of any section will provide you with a link to “View All” if there are additional cases not shown in the container.

My Dashboard

| Unassigned Cases | | | | Stale Cases | | | | Case Management | | | |
|------------------|----------------------|--------------------------|-----------|--------------------------|--|--|--|-----------------|--|--|--|
| 710149 | Counseling | ANDpv-TML | 1/15/2013 | | | | | | | | |
| 521223 | Financial Counseling | CHikLdu ZYfjblVD | 1/14/2013 | | | | | | | | |
| 717338 | Financial Counseling | IRnftt OUHqx- jifRyhk | 1/15/2013 | | | | | | | | |
| 520889 | Financial Counseling | Elqfl fzeNw | 1/24/2013 | | | | | | | | |
| 522097 | Financial Counseling | YrqT vTFbCHPE | 1/25/2013 | | | | | | | | |
| | | | | View All | | | | | | | |

| Assigned Cases | | | | Created Cases | | | | Assigned Calls | | | |
|----------------|------------------------|-------------|--------------|---------------|--|--|--|----------------|--|--|--|
| Case ID | Case Type | Participant | Date Created | | | | | | | | |
| 984527 | Non-Medical Counseling | Jo Zee | 12/23/2020 | | | | | | | | |
| 980142 | SECO Triage | Stephanie | 10/28/2020 | | | | | | | | |
| 980108 | SECO Triage | Rogue | 10/27/2020 | | | | | | | | |
| 980101 | SECO Triage | Rogue | 10/27/2020 | | | | | | | | |
| 980080 | SECO Triage | Hulk | 10/27/2020 | | | | | | | | |
| 980079 | SECO Triage | Hulk | 10/27/2020 | | | | | | | | |

Figure 5



Cases indicated with an exclamation point “!” are referrals that came in during non-business hours and should be addressed with a higher priority.

My Dashboard

Unassigned Cases | Stale Cases | [Case Management](#)

| Case ID | Case Type | Participant | Date Modified |
|---------|----------------------|-------------|---------------|
| 984705 | ! Special Needs | Jo Zee | 1/22/2021 |
| 717277 | Financial Counseling | Michael | 9/20/2012 |
| 707360 | Financial Counseling | Marissa | 10/21/2012 |
| 718032 | Financial Counseling | kKOGV BfEdU | 11/5/2012 |
| 924261 | Financial Counseling | Gerri | 11/6/2012 |

Assigned Cases | Created Cases | Assigned Calls

| Case ID | Case Type | Participant | Date Created |
|---------|------------------------|-------------|--------------|
| 984527 | Non-Medical Counseling | Jo Zee | 12/23/2020 |
| 980142 | SECO Triage | Stephanie | 10/28/2020 |
| 980108 | SECO Triage | Rogue | 10/27/2020 |
| 980101 | SECO Triage | Rogue | 10/27/2020 |
| 980080 | SECO Triage | Hulk | 10/27/2020 |
| 980079 | SECO Triage | Hulk | 10/27/2020 |

Crisis Calls to Associate

| Case ID | Caller | Date Created | Consultant |
|---------|-----------|--------------|------------|
| 984764 | Jo Zee | 2/3/2021 | , |
| 984763 | zpxUJJ Ry | 2/3/2021 | , |
| 984761 | Jo Zee | 2/3/2021 | , |
| 984760 | bette zee | 2/3/2021 | , |
| 984759 | bo duke | 2/3/2021 | , |
| 984758 | Jo Zee | 2/3/2021 | , |
| 984743 | | 1/29/2021 | , |

Follow Ups | Expired

| Case ID | Case Type | Participant | Follow Up |
|---------|------------------------|-------------|-----------|
| 984527 | Non-Medical Counseling | Jo Zee | 1/25/2021 |

Figure 6

2.2. Assigned Cases

You can see all active cases assigned to you in the “Assigned Cases” tab.



2.3. Unassigned Cases

The “Unassigned Cases” tab lists cases created by triage consultants that have not been assigned to a user. The specialty consultant supervisor is responsible for delegating the unassigned cases.

If you see an exclamation point next to the “Case Type,” it indicates the request came in during non-business hours and should be addressed with a higher priority.

My Dashboard

Unassigned Cases | Stale Cases | [Case Management](#)

| Case ID | Case Type | Participant | Date Modified |
|---------|------------------------|-------------|---------------|
| 984705 | ! Special Needs | Jo Zee | 1/22/2021 |
| 717277 | Financial Counseling | Michael | 9/20/2012 |
| 707360 | Financial Counseling | Marissa | 10/21/2012 |
| 718032 | Financial Counseling | kKOGV BfEdU | 11/5/2012 |
| 924261 | Financial Counseling | Geri | 11/6/2012 |

Assigned Cases | Created Cases | Assigned Calls

| Case ID | Case Type | Participant | Date Created |
|---------|------------------------|-------------|--------------|
| 984527 | Non-Medical Counseling | Jo Zee | 12/23/2020 |
| 980142 | SECO Triage | Stephanie | 10/28/2020 |
| 980108 | SECO Triage | Rogue | 10/27/2020 |
| 980101 | SECO Triage | Rogue | 10/27/2020 |
| 980080 | SECO Triage | Hulk | 10/27/2020 |
| 980079 | SECO Triage | Hulk | 10/27/2020 |

Crisis Calls to Associate

| Case ID | Caller | Date Created | Consultant |
|---------|-----------|--------------|------------|
| 984764 | Jo Zee | 2/3/2021 | , |
| 984763 | zpxUJJ Ry | 2/3/2021 | , |
| 984761 | Jo Zee | 2/3/2021 | , |
| 984760 | bette zee | 2/3/2021 | , |
| 984759 | bo duke | 2/3/2021 | , |
| 984758 | Jo Zee | 2/3/2021 | , |
| 984743 | | 1/29/2021 | , |

Follow Ups | Expired

| Case ID | Case Type | Participant | Follow Up |
|---------|------------------------|-------------|-----------|
| 984527 | Non-Medical Counseling | Jo Zee | 1/25/2021 |

Figure 7

2.4. Stale Cases

Stale cases are those which have not been modified in the past seven days.

2.5. Created Cases

You can see all active cases you created in the “Created Cases” tab.



2.6. Assigned Calls

You can see all active Service Provider Calls assigned to you in the “Assigned Calls” tab.

2.7. Crisis Calls to Associate

The Crisis Calls to Associate section lists crisis calls that have not been attached to a participant in the system. Refer to [this Crisis Case section](#) for instructions on associating these calls to a participant's record.

2.8. Follow Ups

You can see all active cases assigned to you with pending follow-ups in “Follow Ups.” If a follow-up is not updated by the Follow-Up Date, it will show in your Expired section and on the specialty consultant supervisor's dashboard.

2.9. Expired

If you have any expired Follow-Ups, you will see them here. These also are shown on the specialty consultant supervisor's dashboard.



3. Supervisor Case Management Dashboard

3.1. Overview

The Case Management Dashboard is for users in supervisory roles to oversee and manage their subordinates' cases. All cases in the eCMS which you have permission to view can be found using this dashboard.

3.2. Accessing the Case Management Dashboard

If you have the appropriate role(s), you will see a "Case Management" dashboard link on the main dashboard. Click it to go to the Case Management dashboard.

My Dashboard

Unassigned Cases Stale Cases **Case Management**

| Case ID | Case Type | Participant | Date Modified |
|---------|----------------------|--------------|---------------|
| 984705 | Special Needs | Jo Zee | 1/22/2021 |
| 717277 | Financial Counseling | Michael | 9/20/2012 |
| 707360 | Financial Counseling | Marissa | 10/21/2012 |
| 718032 | Financial Counseling | kKOGV BfiEdU | 11/5/2012 |
| 924261 | Financial Counseling | Geri | 11/6/2012 |

Assigned Cases Created Cases Assigned Calls

| Case ID | Case Type | Participant | Date Created |
|---------|------------------------|-------------|--------------|
| 984527 | Non-Medical Counseling | Jo Zee | 12/23/2020 |
| 980142 | SECO Triage | Stephanie | 10/28/2020 |
| 980108 | SECO Triage | Rogue | 10/27/2020 |
| 980101 | SECO Triage | Rogue | 10/27/2020 |
| 980080 | SECO Triage | Hulk | 10/27/2020 |
| 980079 | SECO Triage | Hulk | 10/27/2020 |

Crisis Calls to Associate

| Case ID | Caller | Date Created | Consultant |
|---------|-----------|--------------|------------|
| 984764 | Jo Zee | 2/3/2021 | , |
| 984763 | zpxUJJ Ry | 2/3/2021 | , |
| 984761 | Jo Zee | 2/3/2021 | , |
| 984760 | bette zee | 2/3/2021 | , |
| 984759 | bo duke | 2/3/2021 | , |
| 984758 | Jo Zee | 2/3/2021 | , |
| 984743 | | 1/29/2021 | , |

Follow Ups Expired

| Case ID | Case Type | Participant | Follow Up |
|---------|------------------------|-------------|-----------|
| 984527 | Non-Medical Counseling | Jo Zee | 1/25/2021 |

Figure 8



3.3. Filters

You will see only active cases by default but can select "View Closed Cases" to include those if you wish. You can filter the results in the Case Management Dashboard to only see the cases you need. Available filters are:

- Assigned User (name)
- Participant (name)
- Creator Name
- Creator ID
- Case Type(s)
- Creation Date Range
- Modified Date Range
- Follow-up Date Range

Case Management Dashboard

Filter Cases

Assigned User: Participant: Creation Date Range: To View Closed Cases

Creator Name: Creator ID: Modified Date Range: To

Case Type(s): Follow-up Date Range: To

Case Management Dashboard Display Rows: 25

Assign selected cases to:

| Case Id | Case Type | Assigned User | Participant | Creator Name | Creation Date | Date Modified | Follow-up Date |
|---------------------------------|----------------------|---------------|----------------------------------|--------------|---------------|---------------|----------------|
| <input type="checkbox"/> 937812 | Financial Counseling | Lisa2 | ExxDZSJ_axBREBO | DKwaW J | 10/13/2014 | 7/18/2018 | 10/13/2014 |
| <input type="checkbox"/> 937639 | Financial Counseling | Lisa2 | Elizabeth | Lpolayv | 10/13/2014 | 7/18/2018 | 10/14/2014 |
| <input type="checkbox"/> 938333 | Financial Counseling | PKROS1 | Raul | UWvEkS | 10/13/2014 | 9/1/2015 | 10/14/2014 |
| <input type="checkbox"/> 939083 | Financial Counseling | Natasha | nGklv tvdKM | Natasha | 12/3/2014 | 12/3/2014 | 12/3/2014 |
| <input type="checkbox"/> 939074 | Financial Counseling | Patricia | sLOaM VUkGVjwCHZ | Patricia I | 12/3/2014 | 12/3/2014 | 12/5/2014 |
| <input type="checkbox"/> 939335 | Financial Counseling | Christopher | Christopher | Christopher | 12/15/2014 | 12/15/2014 | 12/16/2014 |

Figure 9



3.4. Result Set

You are provided with multiple fields of data in the results:

- Case Id, with a link to the case
- Case Type
- Assigned User
- Participant, with a link to the Participant record
- Creator Name
- Creation Date
- Date Modified
- Follow-up Date

Case Management Dashboard

Filter Cases

Assigned User: Participant: Creation Date Range: To View Closed Cases

Creator Name: Creator ID: Modified Date Range: To

Case Type(s): Follow-up Date Range: To

Case Management Dashboard Display Rows: 25

Assign selected cases to:

| <input type="checkbox"/> | Case Id | Case Type | Assigned User | Participant | Creator Name | Creation Date | Date Modified | Follow-up Date |
|--------------------------|---------|----------------------|---------------|----------------------------------|--------------|---------------|---------------|----------------|
| <input type="checkbox"/> | 937812 | Financial Counseling | Lisa2 | ExxDZSJ_axBREBO | DKwaW J... | 10/13/2014 | 7/18/2018 | 10/13/2014 |
| <input type="checkbox"/> | 937639 | Financial Counseling | Lisa2 | Elizabeth | Lpolayv | 10/13/2014 | 7/18/2018 | 10/14/2014 |
| <input type="checkbox"/> | 938333 | Financial Counseling | PKROSI | Raul | UWvEkS | 10/13/2014 | 9/1/2015 | 10/14/2014 |
| <input type="checkbox"/> | 939083 | Financial Counseling | Natasha | nGklv tvdKM | Natasha | 12/3/2014 | 12/3/2014 | 12/3/2014 |
| <input type="checkbox"/> | 939074 | Financial Counseling | Patricia | sLOaM VUkGVjwCHZ | Patricia I | 12/3/2014 | 12/3/2014 | 12/5/2014 |
| <input type="checkbox"/> | 939335 | Financial Counseling | Christopher | Christopher | Christopher | 12/15/2014 | 12/15/2014 | 12/16/2014 |

Figure 10



3.5. Bulk Assigning

A multi-select feature is provided to assist in assigning cases. Once you have selected the cases you wish to assign, select the assignee, and click "Assign."

Case Management Dashboard Display Rows: 25

Assign selected cases to: Please Select

| <input type="checkbox"/> | Case Id | Case Type | Participant | Creator Name | Creation Date | Date Modified | Follow-up Date |
|-------------------------------------|---------|----------------------|-------------|--------------|---------------|---------------|----------------|
| <input checked="" type="checkbox"/> | 937812 | Financial Counseling | Akila | DKwaW | 10/13/2014 | 7/18/2018 | 10/13/2014 |
| <input type="checkbox"/> | 937639 | Financial Counseling | Aleia | LpoIayv | 10/13/2014 | 7/18/2018 | 10/14/2014 |
| <input checked="" type="checkbox"/> | 938333 | Financial Counseling | Alexander | UWvEkS | 10/13/2014 | 9/1/2015 | 10/14/2014 |
| <input checked="" type="checkbox"/> | 939083 | Financial Counseling | Alice | Natasha | 12/3/2014 | 12/3/2014 | 12/3/2014 |
| <input type="checkbox"/> | 939074 | Financial Counseling | Alice | Patricia | 12/3/2014 | 12/3/2014 | 12/5/2014 |
| <input checked="" type="checkbox"/> | 939335 | Financial Counseling | Alicia | Christopher | 12/15/2014 | 12/15/2014 | 12/16/2014 |
| <input type="checkbox"/> | 939188 | Financial Counseling | Alycen | fred | 12/5/2014 | 7/18/2018 | 12/25/2014 |

Figure 11



4. Search

You can reach the search feature by clicking “Search” in the main navigation bar. Use it to find Participants, [Parent/Guardians](#), [Service Providers](#) and [Cases](#).

4.1. Search for a Participant

You can access the Search screen from anywhere in the system by clicking on “Search” in the navigation bar at the top of the page.

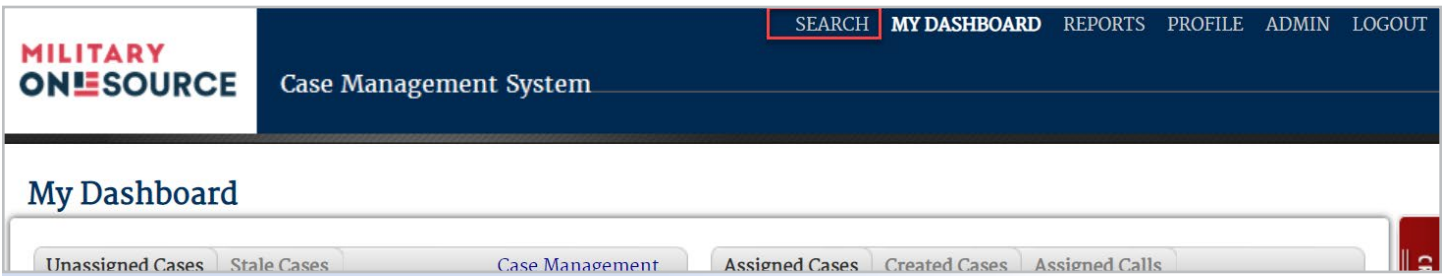


Figure 12

“Search Type” is set to search for Participants by default, but you can also search for “[Parent/Guardian](#)” or “[Service Provider](#)”.

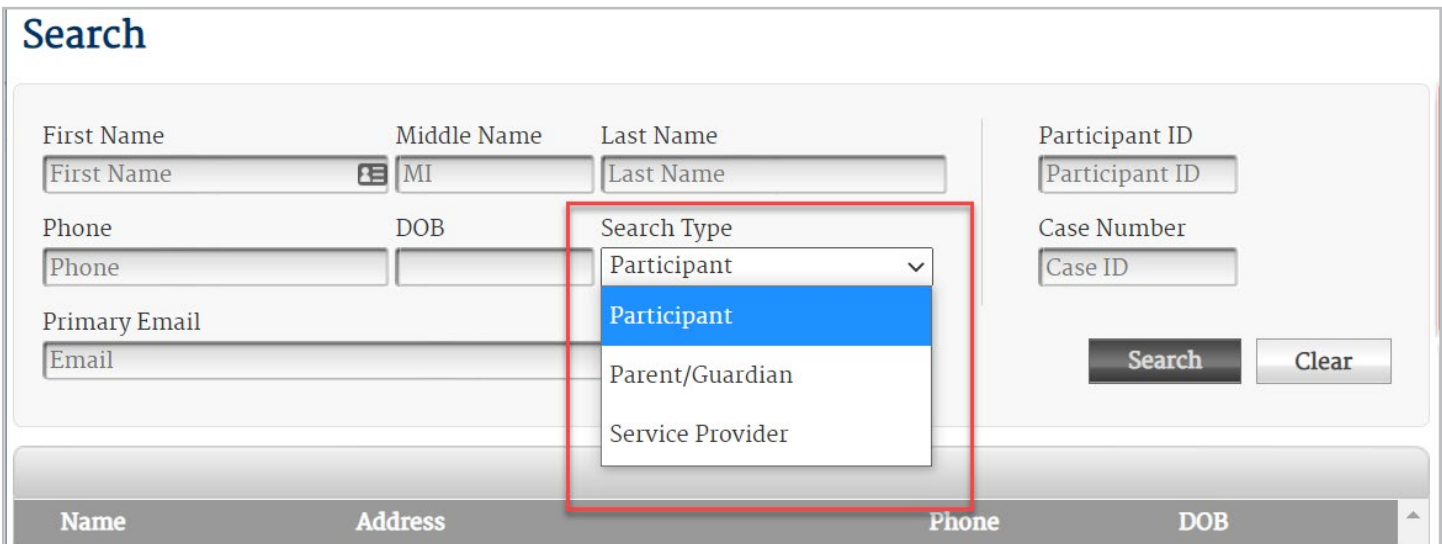


Figure 13



You can quickly search by entering the Participant's ID or their Case Number if you know it.

The screenshot shows a search form with the following fields: First Name (containing 'First Name'), Middle Name (containing 'MI'), Last Name (containing 'Last Name'), Phone (containing 'Phone'), Primary Email (containing 'Email'), Participant ID (containing 'Participant ID'), and Case Number (containing 'Case ID'). A dropdown menu for 'Search Type' is open, showing options: Participant (selected), Parent/Guardian, and Service Provider. 'Search' and 'Clear' buttons are at the bottom right. A table header at the bottom shows 'Name', 'Address', 'Phone', and 'DOB'.

Figure 14

Otherwise, enter their personal information to locate their record. The more information you enter, the narrower the results set become. After entering data into at least one field, select "Search" to see the results.

The screenshot shows the search form with 'B' in the First Name field and 'Zee' in the Last Name field. The Search Type dropdown is set to 'Participant'. A red arrow points from the dropdown to the 'Search' button. Below the form, a message states 'Participant search found 2 participants'. The table header at the bottom shows 'Name', 'Address', 'Phone', and 'DOB'.

Figure 15



If you do not find the Participant, you will need to [create a record for the Participant](#). If you do see the Participant, click the link on the Participant name to [view the Participant's details](#).

Search

| | | | |
|---|--|---|--|
| First Name <input type="text" value="B"/> | Middle Name <input type="text" value="MI"/> | Last Name <input type="text" value="Zee"/> | Participant ID <input type="text" value="Participant ID"/> |
| Phone <input type="text" value="Phone"/> | DOB <input type="text"/> | Search Type <input type="text" value="Participant"/> | Case Number <input type="text" value="Case ID"/> |
| Primary Email <input type="text" value="Email"/> | | | <input type="button" value="Search"/> <input type="button" value="Clear"/> |

Participant search found 2 participants

| Name | Address | Phone | DOB |
|------------------------------|--------------------------------------|---------------|-----------|
| Zee, Bette c | 3921 Westchester, town, CT 23444 | 3-232-323-444 | 8/27/1998 |
| Zee, Bitt | 123 My House, My Best Town, PA 33333 | 234-345-4567 | 9/15/2002 |

Figure 16

4.2. Search for a Parent/Guardian

You can access the search screen from anywhere in the system by clicking on "SEARCH" in the navigation bar at the top of the page.

The screenshot shows the top navigation bar with the Military OneSource logo on the left and a dark blue bar on the right containing the following links: **SEARCH**, MY DASHBOARD, REPORTS, PROFILE, ADMIN, and LOGOUT. Below the navigation bar, the page title "Case Management System" is displayed. Underneath, the "My Dashboard" section features a row of tabs: Unassigned Cases, Stale Cases, Case Management, Assigned Cases, Created Cases, and Assigned Calls. The "SEARCH" link in the navigation bar is highlighted with a red box.

Figure 17



“Search Type” is set to search for Participants by default, so change it to Parent/Guardian so you can enter the Parent/Guardian’s personal information. The more information you enter, the narrower the result set becomes.

Search

| | | | |
|------------------------------------|--|--|--|
| First Name | Middle Name | Last Name | Participant ID |
| <input type="text" value="B"/> | <input type="text" value="MI"/> | <input type="text" value="Zee"/> | <input type="text" value="Participant ID"/> |
| Phone | DOB | Search Type | Case Number |
| <input type="text" value="Phone"/> | <input type="text"/> | <input type="text" value="Participant"/> | <input type="text" value="Case ID"/> |
| Primary Email | <div style="border: 1px solid red; padding: 2px;"><input type="text" value="Participant"/> <input type="text" value="Participant"/> <input type="text" value="Parent/Guardian"/> <input type="text" value="Service Provider"/></div> | | <input type="button" value="Search"/> <input type="button" value="Clear"/> |
| <input type="text" value="Email"/> | | | |

Participant search found 2 participants

Figure 18

After entering data into at least one field, select “Submit” to see the results. If you do not find the Parent/Guardian, you will need to [create a record for the Parent/Guardian](#). If you do see the Parent/Guardian, you can click the link on the Participant name to [view the Parent/Guardian’s details](#).

Search

| | | | |
|------------------------------------|------------------------------------|--|--|
| First Name | Middle Name | Last Name | Case Number |
| <input type="text" value="B"/> | <input type="text" value="MI"/> | <input type="text" value="Zee"/> | <input type="text" value="Case ID"/> |
| Phone | DOB | Search Type | <input type="button" value="Search"/> <input type="button" value="Clear"/> |
| <input type="text" value="Phone"/> | <input type="text"/> | <input type="text" value="Parent/Guardian"/> | |
| Primary Email | <input type="text" value="Email"/> | | |

Parent/Guardian search found 1 parent/guardian

| Name | Address | Phone | DOB |
|--------------------------|--|--------------|-----------|
| zee, Bob | 345 Happiness Hollow, Happy Town, ID 23432 | 678-456-7654 | 6/16/1959 |

Figure 19



In addition to the demographic information for the Parent/Guardian, you can see all "Associated Minor Participants." The Participant Name is a link to that [Participant's record](#). You can also "[Edit the Parent/Guardian](#)" from here.

Search

View Parent/Guardian

| | | | | | |
|--|-----------------------|----------------------------------|---------------------------------|---|---------------------|
| First Bob | Middle | Last zee | Suffix | Preferred Phone 678-456-7654 | Confidential |
| DOB 6/16/1959 | Gender Male | Marital Status Married | | Work Phone | |
| Current Address 345 Happiness Hollow | | | | Cell Phone | |
| Address (continued) | | | | Email Address HappyEmail@mail.com | |
| City Happy Town | State ID | Postal Code 23432 | Country United States | Requires Interpreter No | |

Associated Minor Participant(s)

| Name | Address | Phone | DOB |
|----------------------------------|--|----------------|------------|
| aWztnmtx, NOnRBn | 3020 lCeL HrLKng, MeEMqJo, TX 84084 | 026-713-2004 | 10/24/2013 |
| Zee, Jo Marie | 123 Happy Street Apt 2, Awesomeville, PA 12345 | 2-222-222-2221 | 2/8/2006 |
| Zee, Michelle | 1000 Shirlington Avenue, Arlington, VA 22202 | 000-999-8888 | 3/30/2016 |
| Zee, Sue | 123 My House, My Town, PA 11111 | 222-345-6677 | 5/22/2012 |

Void
Close
Edit

Figure 20



4.3. Search for Service Provider

You can access the Search screen from anywhere in the system by clicking on “SEARCH” in the navigation bar at the top of the page.

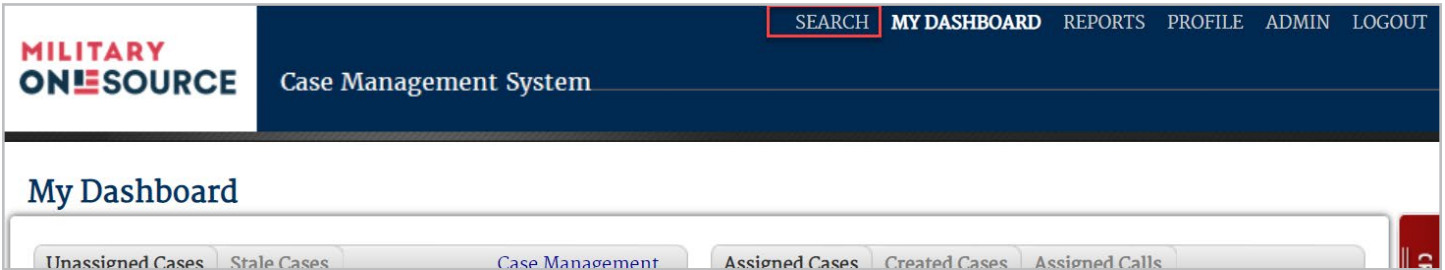


Figure 21

“Search Type” is set to search for Participants by default, so change it to Service Provider so you can enter the Service Provider’s personal information. The more information you enter, the narrower the result set becomes. After entering data into at least one field, select “Submit” to see the results.

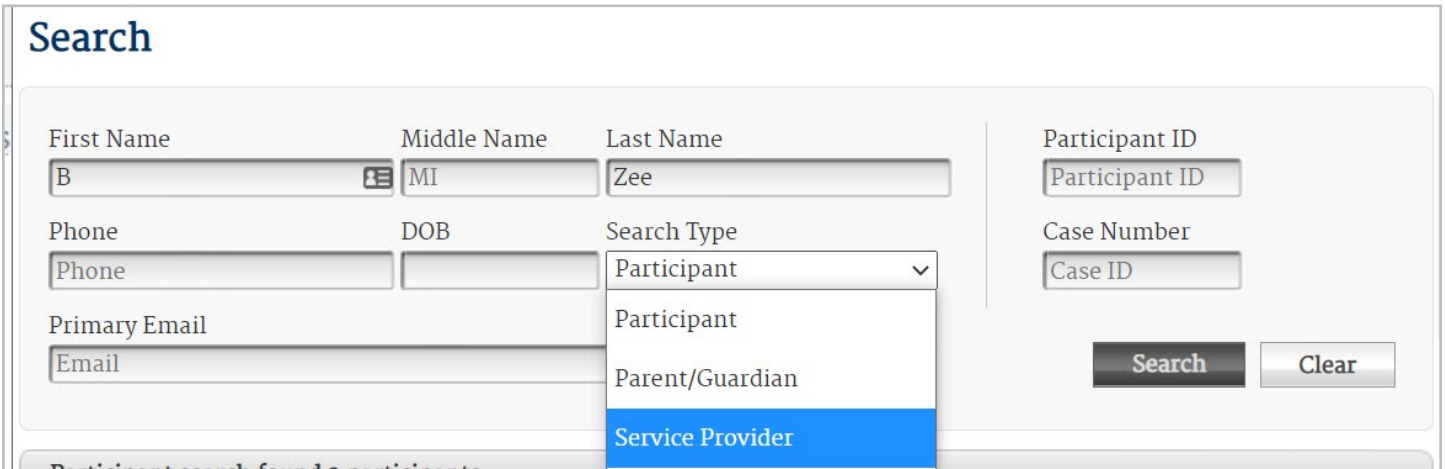


Figure 22



If you do not find the Service Provider, you will need to create a record for the Service Provider. If you do see the Service Provider, click the link on the Service Provider name to view the Service Provider's details.

Search

| | | | |
|---|--|--|--|
| First Name <input type="text" value="B"/> | Middle Name <input type="text" value="MI"/> | Last Name <input type="text" value="Zee"/> | Service Provider ID <input type="text" value="Provider ID"/> |
| Phone <input type="text" value="Phone"/> | DOB <input type="text" value="Not Applicable"/> | Search Type <input type="text" value="Service Provider"/> | Call Number <input type="text" value="Call ID"/> |
| Primary Email <input type="text" value="Email"/> | | | <input type="button" value="Search"/> <input type="button" value="Clear"/> |

Service Provider search found 2 service providers

| Name | Email | Branch / Organization | Phone |
|----------------------------|-------------------|---------------------------------------|--------------|
| Zee, Bette | myname@mail.com | Army / Public School Employees | 222-222-2222 |
| Zee, Bob | namehere@mail.com | Navy / Legal Agencies/Representatives | 333-333-3333 |

Figure 23

4.4. Search for a Case

You can access the Search screen from anywhere in the system by clicking on "SEARCH" in the navigation bar at the top of the page. "Search Type" is set to search for Participants by default.

The screenshot shows the top navigation bar with the following items: SEARCH (highlighted with a red box), MY DASHBOARD, REPORTS, PROFILE, ADMIN, and LOGOUT. Below the navigation bar is the "Case Management System" header. The main content area is titled "My Dashboard" and features a row of tabs: Unassigned Cases, Stale Cases, Case Management (highlighted with a blue bar), Assigned Cases, Created Cases, and Assigned Calls.

Figure 24



You can quickly search by entering the Case Number, if known. Otherwise, you will need to [search for the Participant](#) first.

Search

| | | | |
|------------------------------------|---------------------------------|--|---|
| First Name | Middle Name | Last Name | Participant ID |
| <input type="text" value="B"/> | <input type="text" value="MI"/> | <input type="text" value="Zee"/> | <input type="text" value="Participant ID"/> |
| Phone | DOB | Search Type | Case Number |
| <input type="text" value="Phone"/> | <input type="text"/> | <input type="text" value="Participant"/> | <input type="text" value="254986"/> |
| Primary Email | | | |
| <input type="text" value="Email"/> | | | |
| | | | <input type="button" value="Search"/> |
| | | | <input type="button" value="Clear"/> |

Figure 25



5. Working With Participant Records

5.1. Overview

Most 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:

- [Creating a new Participant](#)
- [Viewing the Participant's details](#) and ["Related Cases"](#)
- [Editing a Participant](#)

5.2. Create a Participant

You must first [search for a Participant](#) to verify the caller does not already have a record in the system. Once you have performed a search, you will see an "Add New" button in the bottom right corner. If the person you are looking for is not in the results list, click "+ Add New" to open the Create Participant form.

Search

| | | | |
|------------------------|-------------------|----------------------------|--|
| First Name B | Middle Name MI | Last Name Zee | Participant ID Participant ID |
| Phone Phone | DOB | Search Type Participant | Case Number Case ID |
| Primary Email Email | | | <input type="button" value="Search"/> <input type="button" value="Clear"/> |

Service Provider search found 2 service providers

| Name | Email | Branch / Organization | Phone |
|----------------------------|-------------------|---------------------------------------|--------------|
| Zee, Bette | myname@mail.com | Army / Public School Employees | 222-222-2222 |
| Zee, Bob | namehere@mail.com | Navy / Legal Agencies/Representatives | 333-333-3333 |

1 - 2 of 2

Page of 1 [Go](#) [Previous](#) | [Next](#)

Figure 26

Required fields are designated by a red asterisk (*). The first section is for the Participant's personal



information, including name, date of birth, address(es), gender, marital status, phone numbers and email address. 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. Fill in as many fields as possible to better distinguish the Participant in the system.

Create New Participant * indicates a required field

| | | | |
|---|--|---------------------------|--------------------------|
| *First Jane | Middle Q | *Last Doe | Suffix |
| *DOB 04/20/1988 | *Gender Female | *Marital Status Single | |
| Current Address 123 Awesome Avenue | | | |
| Address (continued) | | | |
| City Happyville | State VT | Postal Code 22222 | Country United State: |
| Preferred Phone 222-333-6666 | <input checked="" type="checkbox"/> Confidential | | |
| Work Phone | | | |
| Cell Phone 222-333-5454 | <input checked="" type="checkbox"/> Confidential | | |
| Email Address jdoe@mail.com | <input checked="" type="checkbox"/> Confidential | | |
| <input type="checkbox"/> Requires Interpreter Please Select | | | |
| *Receive Outreach Communications Email | | | |
| How did the contact participant hear about the program? Other Military OneSource Program | | | |
| Other Source | | | |
| Time Zone (UTC-08:00) Pacific Time (US & Canada) | | | |
| <input type="checkbox"/> Do Not Use - Duplicate record | | | |
| Eligibility Information | | | |
| *Service Member? <input type="radio"/> Yes <input type="radio"/> No | | | |
| *Relation Please Select | | | |
| *Branch of SVC Please Select | | | |
| *Pay Grade Please Select | | | |
| *Eligibility Status Please Select | | | |
| Separation/Retirement Date 15 | | | |
| <input type="checkbox"/> Wounded Warrior | | | |
| *Assigned Installation Clear Installation Enter an installation... | | | |
| Explain selection of "Other" or "Unknown" | | | |
| <input type="checkbox"/> Administrative Notes Need Review | | | |
| Administrative Notes add | | | |

Figure 27



Next are a few questions related to Military OneSource that help us better serve the military community.

Create New Participant * indicates a required field

| | | | |
|--|---------|-----------------|---------------|
| *First | Middle | *Last | Suffix |
| Jane | Q | Doe | |
| *DOB | *Gender | *Marital Status | |
| 04/20/1988 | Female | Single | |
| Current Address | | | |
| 123 Awesome Avenue | | | |
| Address (continued) | | | |
| | | | |
| City | State | Postal Code | Country |
| Happyville | VT | 22222 | United State: |
| Preferred Phone | | | |
| 222-333-6666 <input checked="" type="checkbox"/> Confidential | | | |
| Work Phone | | | |
| | | | |
| Cell Phone | | | |
| 222-333-5454 <input checked="" type="checkbox"/> Confidential | | | |
| Email Address | | | |
| jdoe@mail.com <input checked="" type="checkbox"/> Confidential | | | |
| <input type="checkbox"/> Requires Interpreter | | | |
| Please Select | | | |
| *Receive Outreach Communications | | | |
| Email | | | |
| How did the contact participant hear about the program? | | | |
| Other Military OneSource Program | | | |
| Other Source | | | |
| | | | |
| Time Zone | | | |
| (UTC-08:00) Pacific Time (US & Canada) | | | |
| <input type="checkbox"/> Do Not Use - Duplicate record | | | |

Eligibility Information

*Service Member?
 Yes
 No

*Relation
Please Select

*Branch of SVC
Please Select

*Pay Grade
Please Select

*Eligibility Status
Please Select

Separation/Retirement Date
15

Wounded Warrior

*Assigned Installation [Clear Installation](#)
Enter an installation...

Explain selection of "Other" or "Unknown"

Administrative Notes Need Review

Administrative Notes [add](#)

Figure 28



Last is the Eligibility section where information about the Service Member is entered.

Create New Participant * indicates a required field

| | | | |
|--|---------|-----------------|---------------|
| *First | Middle | *Last | Suffix |
| Jane | Q | Doe | |
| *DOB | *Gender | *Marital Status | |
| 04/20/1988 | Female | Single | |
| Current Address | | | |
| 123 Awesome Avenue | | | |
| Address (continued) | | | |
| | | | |
| City | State | Postal Code | Country |
| Happyville | VT | 22222 | United State: |
| Preferred Phone | | | |
| 222-333-6666 <input checked="" type="checkbox"/> Confidential | | | |
| Work Phone | | | |
| | | | |
| Cell Phone | | | |
| 222-333-5454 <input checked="" type="checkbox"/> Confidential | | | |
| Email Address | | | |
| jdoe@mail.com <input checked="" type="checkbox"/> Confidential | | | |
| <input type="checkbox"/> Requires Interpreter | | | |
| Please Select | | | |
| *Receive Outreach Communications | | | |
| Email | | | |
| How did the contact participant hear about the program? | | | |
| Other Military OneSource Program | | | |
| Other Source | | | |
| | | | |
| Time Zone | | | |
| (UTC-08:00) Pacific Time (US & Canada) | | | |
| <input type="checkbox"/> Do Not Use - Duplicate record | | | |

Eligibility Information

*Service Member?

Yes
 No

*Relation
Please Select

*Branch of SVC
Please Select

*Pay Grade
Please Select

*Eligibility Status
Please Select

Separation/Retirement Date
15

Wounded Warrior

*Assigned Installation [Clear Installation](#)
Enter an installation...

Explain selection of "Other" or "Unknown"

Administrative Notes Need Review

Administrative Notes [add](#)

Figure 29



If a [Participant is a Minor](#), you will see the personal information fields are red.

Create New Participant * indicates a required field

***First** Middle ***Last** Suffix
Jane Q Doe

***DOB** ***Gender** ***Marital Status**
04/18/2004 Female Single

Current Address
123 Awesome Avenue

Address (continued)

City State Postal Code Country
Happyville VT 22222 United State:

Preferred Phone Confidential
222-333-6666

Work Phone

Cell Phone Confidential
222-333-5454

Email Address Confidential
jdoe@mail.com

Requires Interpreter
Please Select

How did the contact participant hear about the program?
Other Military OneSource Program

Other Source

Time Zone
(UTC-08:00) Pacific Time (US & Canada)

Do Not Use - Duplicate record

Eligibility Information

***Service Member?**
 Yes
 No

***Relation**
Please Select

***Branch of SVC**
Please Select

***Pay Grade**
Please Select

***Eligibility Status**
Please Select

Separation/Retirement Date
15

Wounded Warrior

***Assigned Installation** [Clear Installation](#)
Enter an installation...

Explain selection of "Other" or "Unknown"

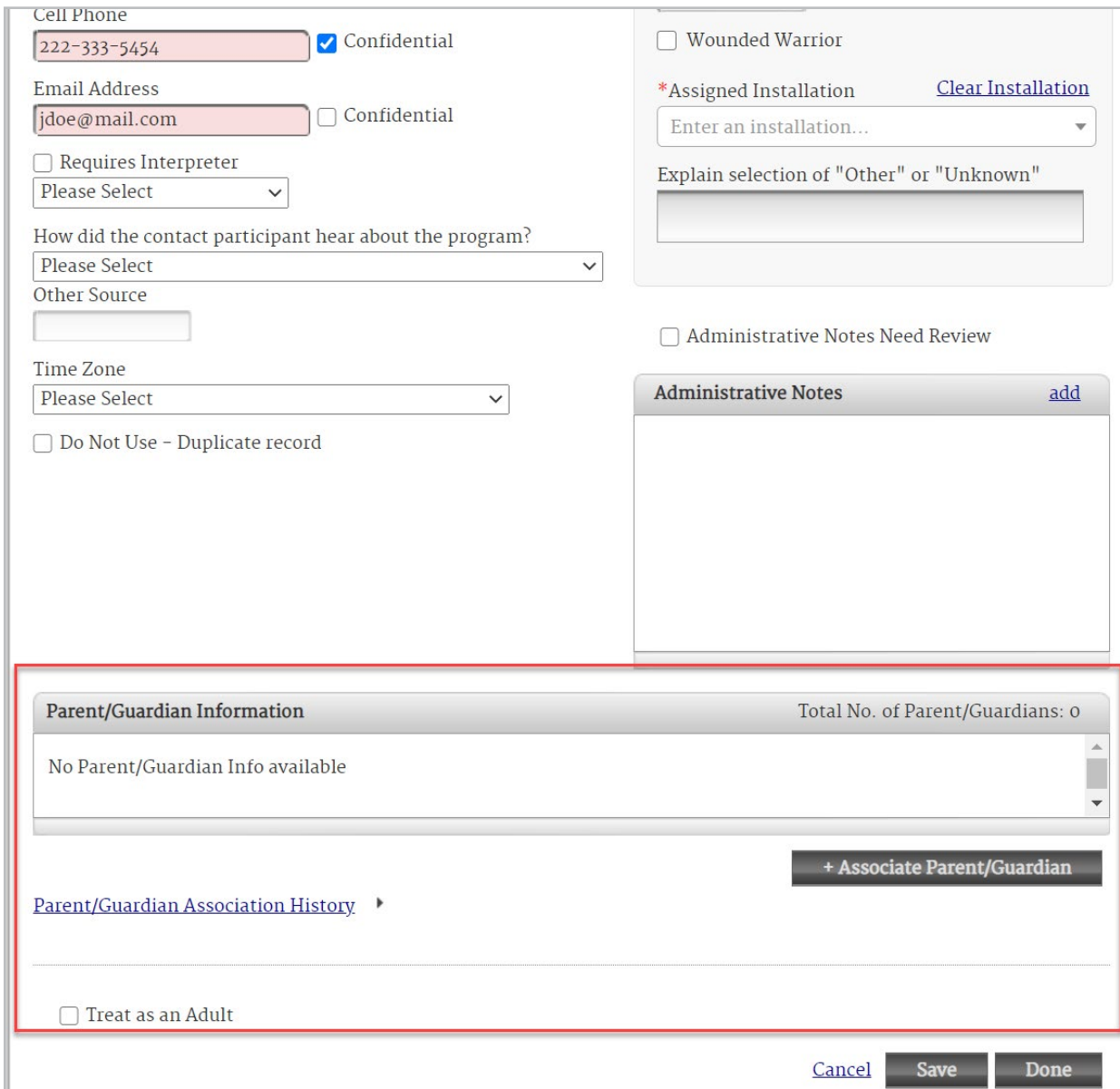
Administrative Notes Need Review

Administrative Notes [add](#)

Figure 30



Also, a [Parent/Guardian section](#) is included at the bottom of the screen.



Cell Phone
222-333-5454 Confidential

Email Address
jdoe@mail.com Confidential

Requires Interpreter
Please Select

How did the contact participant hear about the program?
Please Select

Other Source
[Text Field]

Time Zone
Please Select

Do Not Use - Duplicate record

Wounded Warrior

*Assigned Installation [Clear Installation](#)
Enter an installation...
Explain selection of "Other" or "Unknown"
[Text Field]

Administrative Notes Need Review

Administrative Notes [add](#)

Parent/Guardian Information Total No. of Parent/Guardians: 0
No Parent/Guardian Info available

[+ Associate Parent/Guardian](#)

[Parent/Guardian Association History](#)

Treat as an Adult

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

Figure 31



5.3. View and Edit a Participant

You can access a Participant by clicking their name in your [dashboard](#) or [searching](#) for them. The information shown on the “View Participant” screen and includes personal, contact and eligibility information. From this screen you can do the following:

- Edit the Participant’s information.
- [Create a case](#) for the Participant. ([Crisis](#), [Non-Medical](#), [SECO](#), [Document Translation](#) and many [others](#))
- [Access Participant’s existing cases](#)
- [View Notes on Participant’s cases](#)

Click the “Edit” button to open the “Edit Participant” view.

View Participant

Create Case
Edit

Participant Name and Information

| | | | |
|-------|--------|------|--------|
| First | Middle | Last | Suffix |
| Jo | Marie | Zee | |

| | | |
|-----------|--------|----------------------|
| DOB | Gender | Marital Status |
| 2/20/1992 | Female | Dual Military Career |

Current Address

Address
123 Happy Street

Address (continued)
Apt 2

| | | |
|--------------|-------|-------------|
| City | State | Postal Code |
| Awesomeville | PA | 12345 |

Country
United States

Telephone

| | |
|---|--|
| Preferred Phone 2-222-222-2221 Confidential | Work Phone 3-333-333-3333 Cell Phone 444-444-4444 Confidential |
|---|--|

Email

Email Address
BestEmailAddress@AwesomeEmails.com

Additional Information

Eligibility Info

Service Member?
Yes

Relation
Guardian

Pay Grade
W-3

Branch of SVC
Army National Guard

Eligibility Status
Active Duty

Separation/Retirement Date

Wounded Warrior

Assigned Installation
Camp Parks Reserve Forces Training Area

Administrative Notes

Figure 32



After making any necessary changes you can click “Save” and continue editing, or “Done” to save and return to the “View Participant” screen.

How did the contact participant hear about the program?

Community Mental Health Resources Administrative Notes Need Review

Other Source

Time Zone
Please Select

Do Not Use - Duplicate record

Created By
Lisa Greer - 2/1/2017 2:52:40 PM

Last Modified By

Lisa Greer - 4/17/2021 8:22:18 PM

Last Accessed
Lisa Greer - 4/17/2021 8:45:11 PM

[Cancel](#)

Administrative Notes [add](#)

Figure 33



6. Working With Minor Participants and Parent/Guardian Records

6.1. Overview

A Participant under the age of 18 based on the Date of Birth in the system is designated as a minor. Parent/Guardians can be added to the system and associated with any related Minor Participant(s). Once associated with a Participant, the Parent/Guardian can have some access to data related to the Minor Participant's records.

6.2. Viewing Minor Participant Details

You will notice some changes when a Participant is a minor. An icon indicating the Participant is a minor is shown in the Participant Overview in the left panel, and below the Eligibility section on the right. You will see the Date of Birth is italicized and red in both the Participant Overview and Details area.

View Participant [Create Case] [Edit]



| | | | | | |
|--|--|--|--|--|--|
| DASHBOARD PARTICIPANT OVERVIEW  Name Jo Marie Zee Participant ID 585069 Current Address 123 Happy Street Apt 2 Awesomeville, PA 12345 United States Preferred Phone 2-222-222-2221 Confidential Work Phone 3-333-333-3333 Cell Phone 444-444-4444 Confidential Email Address BestEmailAddress@AwesomeEmails.com DOB 2/19/2004 Service Member? Yes Relation Guardian | Participant Name and Information First Middle Last Suffix Jo Marie Zee DOB 2/19/2004 Gender Female Marital Status Dual Military Career | | | | Eligibility Info Service Member? Yes Relation Guardian Pay Grade W-3 Branch of SVC Army National Guard Eligibility Status Active Duty Separation/Retirement Date  Wounded Warrior  Minor Participant Assigned Installation Camp Parks Reserve Forces Training Area Administrative Notes |
| | Current Address Address 123 Happy Street Address (continued) Apt 2 City State Postal Code Awesomeville PA 12345 Country United States | | | | |
| | Telephone Preferred Phone Work Phone 2-222-222-2221 3-333-333-3333 Cell Phone Confidential 444-444-4444 Confidential | | | | |
| | Email Email Address BestEmailAddress@AwesomeEmails.com | | | | |

Figure 34



Scrolling down, you will find the addition of a [Parent/Guardian](#) section.

The screenshot displays a web form with the following sections:

- Cell Phone:** Input field with "222-333-5454" and a checked "Confidential" checkbox.
- Email Address:** Input field with "jdoe@mail.com" and an unchecked "Confidential" checkbox.
- Requires Interpreter:** Unchecked checkbox and a dropdown menu with "Please Select".
- How did the contact participant hear about the program?:** Dropdown menu with "Please Select".
- Other Source:** Input field.
- Time Zone:** Dropdown menu with "Please Select".
- Do Not Use - Duplicate record:** Unchecked checkbox.
- Wounded Warrior:** Unchecked checkbox.
- *Assigned Installation:** Dropdown menu with "Enter an installation..." and a "Clear Installation" link.
- Explain selection of "Other" or "Unknown":** Text input field.
- Administrative Notes Need Review:** Unchecked checkbox.
- Administrative Notes:** Section with an "add" link and a text area.

The **Parent/Guardian Information** section is highlighted with a red border and contains:

- Section header: **Parent/Guardian Information** (Total No. of Parent/Guardians: 0)
- Text: No Parent/Guardian Info available
- Button: **+ Associate Parent/Guardian**
- Link: [Parent/Guardian Association History](#)
- Checkbox: Treat as an Adult

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

Figure 35



For any minor who has not yet provided information on any Parent/Guardian, a message box is displayed at the top of the page to remind you to ask for that information.

View Participant Create Case Edit

DASHBOARD

PARTICIPANT OVERVIEW

Name
Jo Marie Zee

Participant ID
585069

Current Address
123 Happy Street
Apt 2

Participant Name and Information

| First | Middle | Last | Suffix |
|-------|--------|------|--------|
| Jo | Marie | Zee | |

Eligibility Info

Service Member?
Yes

Relation

DOB
2/19/2004

Gender
Female

Marital Status
Dual Military Career

Warning: This participant is a minor, but has not supplied parent/guardian information. Please ask participant if they would like to supply this now.

Figure 36

6.3. Search for Parent/Guardian

6.3.1. USING SEARCH SCREEN

You should use the main [Search](#) screen if you do not have the Participant information, or you wish to view the Parent/Guardian record independent of their Minor Participant(s).

6.3.2. FROM MINOR PARTICIPANT DETAILS

Click the Edit button to open the editable view of the Participant.

View Participant Create Case Edit

Participant Name and Information

| First | Middle | Last | Suffix |
|-------|--------|------|--------|
| Jo | Marie | Zee | |

Eligibility Info

Service Member?
Yes

Relation
Guardian

DOB
2/20/1992

Gender
Female

Marital Status
Dual Military Career

Figure 37



This is where you can manage their Parent/Guardians. Notice the personal information fields for a minor are all red. Scroll down to the Parent/Guardian section at the bottom of the screen.

Edit Participant * indicates a required field

***First** Middle ***Last** Suffix
 Jo Marie Zee

***DOB** ***Gender** ***Marital Status**
 2/19/2004 Female Dual Military Career

Current Address
 123 Happy Street

Address (continued)
 Apt 2

City State Postal Code Country
 Awesomeville PA 12345 United States

Preferred Phone Confidential
 2-222-222-2221

Work Phone
 3-333-333-3333

Cell Phone Confidential
 444-444-4444

Email Address Confidential
 BestEmailAddress@Awesome

Requires Interpreter
 Please Select

How did the contact participant hear about the program?
 Community Mental Health Resources

Other Source

Time Zone
 Please Select

Do Not Use - Duplicate record

Created By
 Lisa Greer - 2/1/2017 2:52:40 PM

Last Modified By
 Lisa Greer - 4/17/2021 8:58:18 PM

Last Accessed
 Lisa Greer - 4/17/2021 8:58:19 PM

Eligibility Information

***Service Member?**
 Yes
 No

***Relation**
 Guardian

***Branch of SVC**
 Army National Guard

***Pay Grade**
 W-3

***Eligibility Status**
 Active Duty

Separation/Retirement Date

Wounded Warrior

***Assigned Installation** [Clear Installation](#)
 Camp Parks Reserve Forces Training Area

Explain selection of "Other" or "Unknown"

Administrative Notes Need Review

Administrative Notes [add](#)

Parent/Guardian Information Total No. of Parent/Guardians: 0

No Parent/Guardian Info available

+ Associate Parent/Guardian

[Parent/Guardian Association History](#)

Figure 38



Click "+Associate Parent/Guardian" to open the "Add New or Associate Parent/Guardian" modal.

You should enter as much information as you can about the Parent/Guardian and "Search."

Add New or Associate Parent/Guardian

First Middle Last
First Middle zee

Phone DOB Email
Phone Email

Search Clear

Parent/guardian search found 5 parent/guardians

| Name | Address | Phone | DOB |
|-------------------------------------|--|--------------|-----------|
| <input type="checkbox"/> zee, Bob | 345 Happiness Hollow, Happy Town, ID 23432 | 678-456-7654 | 6/16/1959 |
| <input type="checkbox"/> Zee, Hilda | 123 My Best House, My Best Town, PA 33333 | 776-557-4765 | 9/19/1960 |
| <input type="checkbox"/> Zee, Khan | | | 9/12/2017 |
| <input type="checkbox"/> Zee, Oscar | 123 Happy Street Apt 2, Awesomeville, PA 12345 | | 8/10/1976 |
| <input type="checkbox"/> zee Oscar | 12345 | | 8/10/1976 |

0 parent/guardian(s) selected for association

Cancel Associate and Close + Add New

Figure 39

If the Parent/Guardian is not found, you will need to [create a record for the Parent/Guardian](#).

If the Parent/Guardian is found, you can [associate the Parent/Guardian's record](#).



6.4. Create Parent/Guardian for Minor Participant

You will start this process from the Parent/Guardian section at the bottom of the Minor [Participant's record](#). Click "+Associate Parent/Guardian" to open the "Add New or Associate Parent/Guardian" modal.

| | |
|-----------------|------------------------|
| Lisa [redacted] | - 4/17/2021 9:02:52 PM |
| Last Accessed | |
| Lisa [redacted] | - 4/17/2021 9:01:20 PM |

Parent/Guardian Information Total No. of Parent/Guardians: 0

No Parent/Guardian Info available

+ Associate Parent/Guardian

[Parent/Guardian Association History](#) ▶

Treat as an Adult

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

Figure 40



You must first search for a Parent/Guardian to verify they do not already have a record in the system. Once you have performed a search, the “+Add New” button in the bottom right corner is enabled.

Add New or Associate Parent/Guardian

First Middle Last

Phone DOB Email

Parent/guardian search found 5 parent/guardians

| Name | Address | Phone | DOB |
|-------------------------------------|--|--------------|-----------|
| <input type="checkbox"/> zee, Bob | 345 Happiness Hollow, Happy Town, ID 23432 | 678-456-7654 | 6/16/1959 |
| <input type="checkbox"/> Zee, Hilda | 123 My Best House, My Best Town, PA 33333 | 776-557-4765 | 9/19/1960 |
| <input type="checkbox"/> Zee, Khan | | | 9/12/2017 |
| <input type="checkbox"/> Zee, Oscar | 123 Happy Street Apt 2, Awesomeville, PA 12345 | | 8/10/1976 |
| <input type="checkbox"/> Zee, Oscar | | | 8/10/1976 |

0 parent/guardian(s) selected for association

Figure 41

This opens the “Add New Parent/Guardian” modal where you can enter the personal information for the Parent/Guardian.

If the Parent/Guardian has the same address as the Minor Participant, you can select the “Same as Participant” link and the system will fill the address fields for you.

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.

Selecting “Save and Associate” saves the Parent/Guardian record and associates them with the Participant.



Address Street 123 Happy Street *Relation Guardian

Add New Parent/Guardian

*First Middle *Last Suffix Preferred Phone
Bill [] Zee [] 333-222-6565 Confidential

*DOB *Gender *Marital Status Work Phone
04/28/1984 [] Not Identified [] Unknown [] []

Current Address [Same As Participant](#) Cell Phone
123 Happy Street 222-333-4545 Confidential

Address (continued) Email Address
Apt 2 bzee2@mail.com Confidential

City State Postal Code Country
Awesomeville PA [] 12345 United States []

Requires Interpreter
Please Select []

Cancel Back to Search **Save and Associate**

Figure 42

When you click the “Save and Associate” button, the new Parent/Guardian record is saved and associated with the Minor Participant.

View the details of this Parent/Guardian as well as any others associated to the Participant in the “Parent Guardian Information” container.



6.5. Associate Existing Parent/Guardian With Minor Participant

You will start this process from the Parent/Guardian section at the bottom of the Minor [Participant's record](#). Click "+Associate Parent/Guardian" to open the "Add New or Associate Parent/Guardian" modal.

Lisa [redacted] - 4/17/2021 9:02:52 PM
Last Accessed
Lisa [redacted] - 4/17/2021 9:01:20 PM

Parent/Guardian Information Total No. of Parent/Guardians: 0

No Parent/Guardian Info available

+ Associate Parent/Guardian

[Parent/Guardian Association History](#) ▶

Treat as an Adult

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

Figure 43

You must first search for a Parent/Guardian to verify they have a record in the system. If the person you are looking for is not in the results list, you must [create the Parent/Guardian record](#).

If the person you are looking for is in the results list, select the checkbox next to their name to indicate you want to associate them with this Minor Participant. If you need to associate multiple Parent/Guardians at once, you can perform a broader search and use the multi-select feature. Once you have selected all Parent/Guardians needed, you can click the "Save and Associate" button to associate them with the Minor Participant.



Current Address
123 Happy Street

*Relation
Guardian

Add New or Associate Parent/Guardian

First Middle Last
First Middle zee

Phone DOB Email
Phone Email Search Clear

Parent/guardian search found 5 parent/guardians

| Name | Address | Phone | DOB |
|--|--|--------------|-----------|
| <input checked="" type="checkbox"/> zee, Bob | 345 Happiness Hollow, Happy Town, ID 23432 | 678-456-7654 | 6/16/1959 |
| <input type="checkbox"/> Zee, Hilda | 123 My Best House, My Best Town, PA 33333 | 776-557-4765 | 9/19/1960 |
| <input type="checkbox"/> Zee, Khan | | | 9/12/2017 |
| <input checked="" type="checkbox"/> Zee, Oscar | 123 Happy Street Apt 2, Awesomeville, PA 12345 | | 8/10/1976 |
| <input type="checkbox"/> zee, Oscar | 54321 | | 8/10/1976 |

2 parent/guardian(s) selected for association

Cancel Associate and Close + Add New

Figure 44

View the details of this Parent/Guardian as well as any others associated to the Participant in the "Parent Guardian Information" container.



6.6. Working With the Parent/Guardian Information Container

You can see the details of all associated Parent/Guardians in the Parent/Guardian information container. You also can manage some of the Parent/Guardian functionality from here.

6.6.1. VIEW ASSOCIATED PARENT/GUARDIANS

On a Minor Participant’s view or edit screen, you scroll down to the “Parent/Guardian Information” container and click the bar with the Parent/Guardian name to expand or collapse its details.

Parent/Guardian Information Total No. of Parent/Guardians: 2

- ▶ zee, Bob
- ▼ Zee, Oscar

| First | Middle | Last | Suffix |
|-------|--------|------|--------|
| Oscar | | Zee | |

DOB
8/10/1976

Gender
Female

Marital Status
Married

Current Address

Address
123 Happy Street
Apt 2

| City | State | Postal Code | Country |
|--------------|-------|-------------|---------------|
| Awesomeville | PA | 12345 | United States |

[Parent/Guardian Association History](#) ▶

Figure 45



6.6.2. EDIT ASSOCIATED PARENT/GUARDIANS

While viewing a Minor Participant, click the “Edit” button in the top right corner. Scroll down and you will see some new actions available in the “Parent/Guardian Information” container.

Parent/Guardian Information Total No. of Parent/Guardians: 2

| | | |
|--------------|------------------------------------|----------------------|
| ▶ zee, Bob | Remove Association | Edit |
| ▼ Zee, Oscar | Remove Association | Edit |

First Oscar **Middle** **Last** Zee **Suffix**

DOB 8/10/1976 **Gender** Female **Marital Status** Married

Current Address

Address
123 Happy Street
Apt 2

City Awesomeville **State** PA **Postal Code** 12345 **Country** United States

[+ Associate Parent/Guardian](#)

[Parent/Guardian Association History](#) ▶

Figure 46



Click the "Edit" link in line with the Parent/Guardian whose details you wish to edit. In the "Edit Associated Parent/Guardian" you can make the necessary changes and "Save" the record.

Edit Associated Parent/Guardian

| | | | | | |
|---------------------|-------------------------------------|-----------------|---------------|---|---------------------------------------|
| *First | Middle | *Last | Suffix | Preferred Phone | <input type="checkbox"/> Confidential |
| Oscar | | Zee | | | |
| *DOB | *Gender | *Marital Status | | Work Phone | |
| 8/10/1976 | Female | Married | | | |
| Current Address | Same As Participant | | | | |
| 123 Happy Street | | | | | |
| Address (continued) | Apt 2 | | | | |
| City | State | Postal Code | Country | <input type="checkbox"/> Requires Interpreter | |
| Awesomeville | PA | 12345 | United States | | Please Select |

Void Clicking 'Save' will save the parent/guardian record only **Cancel** **Save**

Figure 47



6.6.3. REMOVE ASSOCIATION WITH PARENT/GUARDIAN

While viewing a Minor Participant, click the “Edit” button in the top right corner. Scroll down and you will see some new actions available in the “Parent/Guardian Information” container. Click the “Remove Association” link in line with the Parent/Guardian who should no longer be associated with the Participant. A confirmation popup will ask if you wish to continue prior to removing the association.

Parent/Guardian Information Total No. of Parent/Guardians: 2

| | | |
|--------------|------------------------------------|----------------------|
| ▶ zee, Bob | Remove Association | Edit |
| ▼ Zee, Oscar | Remove Association | Edit |

| | | | |
|---|-------------------------|----------------------------------|---------------------------------|
| First Oscar | Middle | Last Zee | Suffix |
| DOB 8/10/1976 | Gender Female | Marital Status Married | |
| Current Address | | | |
| Address 123 Happy Street Apt 2 | | | |
| City Awesomeville | State PA | Postal Code 12345 | Country United States |

[+ Associate Parent/Guardian](#)

[Parent/Guardian Association History](#) ▶

Figure 48



You will no longer see the removed Parent/Guardian in the “Parent/Guardian Information” container. If needed, you can re-associate them, [associate](#) a different Parent/Guardian or [create](#) a new one.

| Parent/Guardian Information | Total No. of Parent/Guardians: 1 |
|-----------------------------|---|
| ▶ zee, Bob | Remove Association Edit |

[Parent/Guardian Association History](#) ▶

[+ Associate Parent/Guardian](#)

Figure 49



6.7. Understanding Parent/Guardian Association History

A record is maintained of changes made to a Minor Participant's Parent/Guardian(s). You will find the "Parent/Guardian Association History" at the bottom of the Participant Details view.

| Parent/Guardian Information | Total No. of Parent/Guardians: 1 |
|---|---|
| ▶ zee, Bob | Remove Association Edit |
| | |
| + Associate Parent/Guardian | |
| Parent/Guardian Association History ▶ | |

Figure 50



It contains the Parent/Guardian name, the action performed on them, the name of the User who performed the action and when it occurred.

[+ Associate Parent/Guardian](#)

[Parent/Guardian Association History](#) ▾

Parent/Guardian Association History

| Parent/Guardian Name | Action Performed | User Name | Date/Time |
|----------------------|---------------------|-----------------|--------------------------|
| Zee, Oscar | Association removed | Lisa [redacted] | 4/17/2021 9:22:47 PM UTC |
| zee, Bob | Association created | Lisa [redacted] | 4/17/2021 9:16:43 PM UTC |
| Zee, Oscar | Association created | Lisa [redacted] | 4/17/2021 9:16:43 PM UTC |

Treat as an Adult

Figure 51



7. Creating Cases

7.1. Overview

The following information outlines the processes for creating cases within the eCMS. While working on your cases, save your work frequently by selecting the Save button. Exit your case at any point by selecting the Done button at the bottom of the page (selecting Done also saves the file). Return to the case creation for a limited time by selecting it from the Referrals area in the left panel when viewing the Participant.

| | | |
|--|---|--|
| Branch of SVC Army National Guard Eligibility Status Active Duty Assigned Installation Camp Parks Reserve Forces Training Area | No Receive Outreach Communications Not Applicable - Minor Participant How did the contact participant hear about the program? Community Mental Health Resources Time Zone No TimeZone Selected Do Not Use - Duplicate record No Created By Lisa Greer - 2/1/2017 2:52:40 PM Last Modified By Lisa Greer - 4/17/2021 9:31:08 PM Last Accessed Lisa Greer - 4/17/2021 9:31:08 PM | |
| PARENT/GUARDIAN INFO | | |
| Name Bob zee | | |
| CURRENT REFERRALS | | |
| Financial Counseling | | |

Figure 52

The following case types can be created in the eCMS:

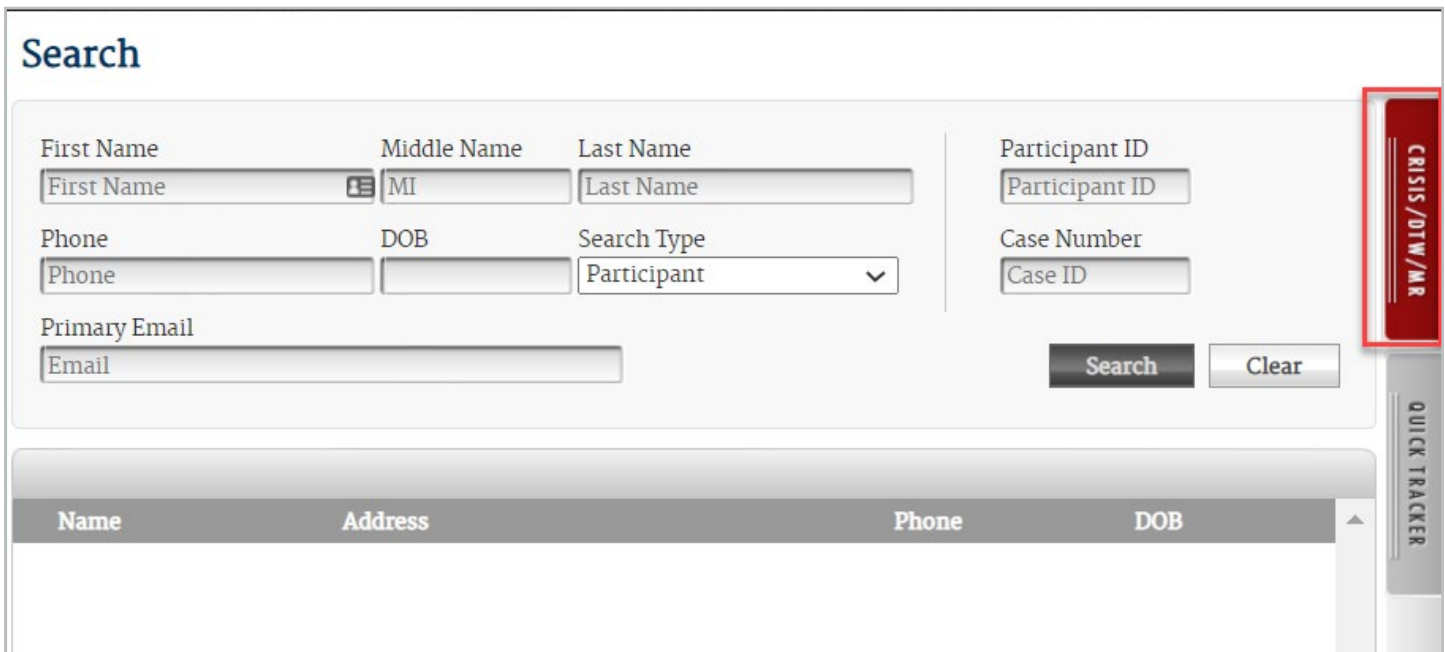
- [Crisis](#)
- [Non-Medical Counseling](#)
 - » Outside Scope for Non-Medical Counseling
 - » In Scope for Non-Medical Counseling
- SECO
 - » [Triage](#)
 - » [Specialty Consult and/or Spouse Group \(coming soon\)](#)
- [Document Translation](#)
- [Wounded Warrior Resources](#)
- [Info and Referral](#)
- [Work Life](#)
 - » Work Life
 - » Financial
 - » Tax



- » Elder Care
- » Education
- » Adult Disability
- » Adoption
- **Consultation-Based**
 - » Health & Wellness
 - » Special Needs
 - » Peer Support
 - » Spouse Relocation
 - » Healthy Relationships
 - » New MilParent
 - » Transitioning Veteran

7.2. Create a Crisis Case

You can open the “Crisis / DTW / MR” tab on the right of any screen to begin creating a Crisis case. If you are viewing a Participant when it opens, the participant’s personal information is populated in the case for you. Otherwise, you will need to enter this information.



Search

First Name: Middle Name: Last Name:

Phone: DOB: Search Type:

Primary Email:

Participant ID:

Case Number:

| Name | Address | Phone | DOB |
|------|---------|-------|-----|
|------|---------|-------|-----|

Figure 53



Begin by explaining the Limits of Confidentiality. Then enter as much information on the form as possible. Some fields are required. You will notice a red asterisk (*) next to them.

Search

CRISIS/DTW/M/R

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 Workflow
- Reserve, Guard or Recruiting POC
- SARC

Limits of Confidentiality Explained

“Please be advised the 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, including sexual assault involving service members, and any present or future illegal activity.”

AIR FORCE SERVICE MEMBERS AND FAMILY MEMBERS ONLY:
 “For Personnel Reliability Program (PRP) certified participants, reporting any concerns related to reliability is also required.”

First Middle Last

Home Phone DOB

Figure 54

In the left panel, select all items that apply to the call before saving the form.

Search

CRISIS/DTW/M/R

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 Workflow
- Reserve, Guard or Recruiting POC
- SARC

Limits of Confidentiality Explained

“Please be advised the 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, including sexual assault involving service members, and any present or future illegal activity.”

AIR FORCE SERVICE MEMBERS AND FAMILY MEMBERS ONLY:
 “For Personnel Reliability Program (PRP) certified participants, reporting any concerns related to reliability is also required.”

First Middle Last

Home Phone DOB

Figure 55



You will now need to decide if you will [attach a Participant to the Crisis case](#).

Case Management System

CRISIS CASE CALL
jo
If you'd like to attach a participant to this call, select someone from the [search](#) results Not Now

Search

| | | | |
|------------|-------------|-------------|----------------|
| First Name | Middle Name | Last Name | Participant ID |
| jo | MI | Last Name | Participant ID |
| Phone | DOB | Search Type | Case Number |

Note: A red box highlights the 'CRISIS CASE CALL' notification, and a red arrow points from the 'search' link in the notification to the search form below.

Figure 56

7.2.1. ATTACHING A PARTICIPANT TO A CRISIS CASE

When you create and save a crisis case, or view an Unattached Crisis case, you will be asked if you want to attach a Participant to the case.

If you began the case when viewing a Participant's record, you can agree to attach that Participant to the crisis call. If it is the correct Participant, answer "Yes" to attach them to the case.

CRISIS CASE CALL
jo
Attach this person to a crisis call? Yes No

View Participant Create Case Edit

| Participant Name and Information | | | | Eligibility Info |
|----------------------------------|--------|----------------------|--------|------------------|
| First | Middle | Last | Suffix | Service Member? |
| Jo | Marie | Zee | | Yes |
| DOB | Gender | Marital Status | | Relation |
| 2/18/2004 | Female | Dual Military Career | | |

Note: A red box highlights the 'Name' field in the participant overview on the left, which contains 'Jo Marie Zee'.

Figure 57



Otherwise, to attach a participant to this call after selecting “No” you will need to select someone from the search results by clicking the link in the message.

Case Management System

CRISIS CASE CALL
jo
If you'd like to attach a participant to this call, select someone from the [search](#) results Not Now

Search

| | | | |
|------------|-------------|-------------|----------------|
| First Name | Middle Name | Last Name | Participant ID |
| jo | MI | Last Name | Participant ID |
| Phone | DOB | Search Type | Case Number |

Figure 58

You will see some fields prefilled from the information in the Crisis Case. Add more information into the filters to search. Select the correct Participant to attach them. If you do not see the correct Participant, scroll to the bottom right corner and click “+Add New.” Complete the form to [create the Participant](#) and you can then attach them to the Crisis case.

You also have the option of postponing attaching a Participant to the Crisis case by selecting “Not Now.” The case will then appear in the “[Unattached Crisis Calls](#)” list.

CRISIS CASE CALL
jo
If you'd like to attach a participant to this call, select someone from the [search](#) results Not Now

Search

| | | | |
|------------|-------------|-------------|----------------|
| First Name | Middle Name | Last Name | Participant ID |
| jo | MI | Last Name | Participant ID |
| Phone | DOB | Search Type | Case Number |
| Phone | | Participant | Case ID |

UNATTACHED CRISIS CALLS

- Queue
- jo
- Jo Zee
- zpxUJJ.Ry
- Jo Zee
- bette zee
- bo duke
- Jo Zee
- William

Figure 59



7.2.2. UNATTACHED CRISIS CALLS

Unattached Crisis Calls are those which are not attached to a Participant in the system. These are shown in the left panel when viewing the Search screen, and in the supervisor's Case Management Dashboard. You can [attach a Crisis Call to a Participant](#) at any time.

The screenshot shows a 'Search' interface. On the left, a sidebar titled 'UNATTACHED CRISIS CALLS' contains a 'Queue' with a list of names: jo, Jo Zee, zpxUJl Ry, Jo Zee, bette zee, bo duke, Jo Zee, Wilma, Wilma, Daniel, Daniel. The main search area has several input fields: First Name (with a dropdown showing 'MI'), Middle Name, Last Name, Phone, DOB, Search Type (dropdown set to 'Participant'), Primary Email, Participant ID, Case Number, and Case ID. There are 'Search' and 'Clear' buttons. Below the search fields, a message states 'Participant search found 1246 participants' and a table header is visible with columns for Name, Address, Phone, and DOB.

Figure 60

7.3. Create a Non-Medical Counseling Case

A case can be created for a Participant while viewing their Participant record or one of their cases. From the Participant record, you can select "Create Case" to open the navigation list of Case Types to choose from. If viewing a case, simply select the "Program Referrals" tab on the right of your screen.

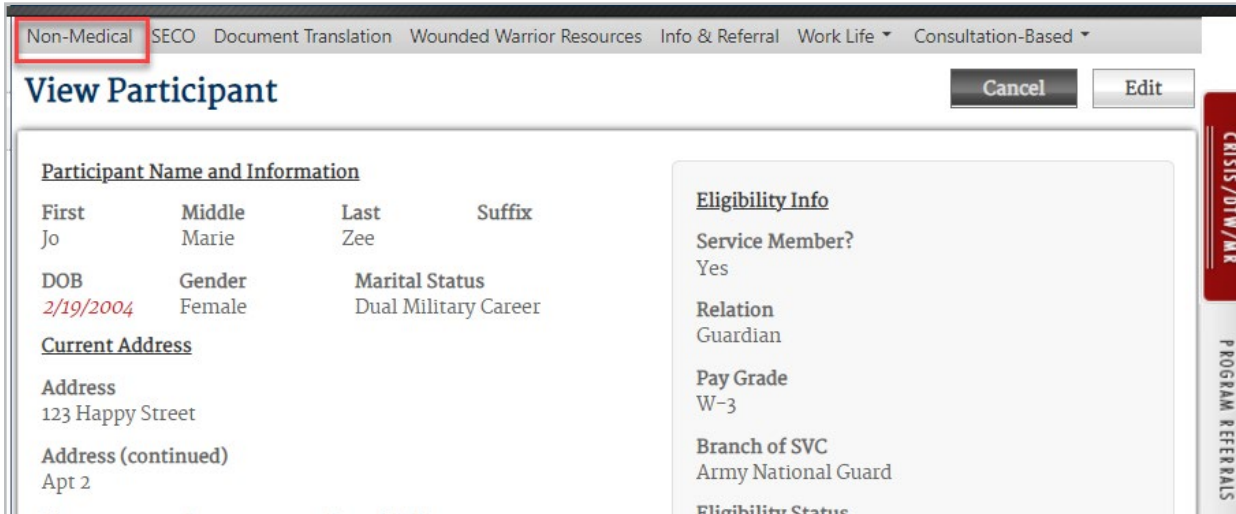
The screenshot shows the 'View Participant' record for a participant named Jo Marie Zee. At the top right, there are 'Create Case' and 'Edit' buttons. The record is divided into several sections:

- Participant Name and Information:** First (Jo), Middle (Marie), Last (Zee), Suffix.
- DOB:** 2/19/2004
- Gender:** Female
- Marital Status:** Dual Military Career
- Current Address:** 123 Happy Street, Apt 2, Awesomeville PA, 12345, United States.
- Eligibility Info:** Service Member? Yes, Relation: Guardian, Pay Grade: W-3, Branch of SVC: Army National Guard, Eligibility Status: Active Duty, Separation/Retirement Date.
- Wounded Warrior:** Indicated by a logo.

 On the right side, there is a vertical navigation menu with tabs: 'CRISIS /DTW/M/R', 'PROGRAM REFERRALS', and 'RELATED CAS'. The 'PROGRAM REFERRALS' tab is highlighted with a red box.



Select "Non-Medical."



Non-Medical | SECO | Document Translation | Wounded Warrior Resources | Info & Referral | Work Life | Consultation-Based

View Participant

Cancel Edit

| Participant Name and Information | | | | Eligibility Info |
|----------------------------------|--------|----------------------|--------|---------------------|
| First | Middle | Last | Suffix | Service Member? |
| Jo | Marie | Zee | | Yes |
| DOB | Gender | Marital Status | | Relation |
| 2/19/2004 | Female | Dual Military Career | | Guardian |
| Current Address | | | | Pay Grade |
| Address | | | | W-3 |
| 123 Happy Street | | | | Branch of SVC |
| Address (continued) | | | | Army National Guard |
| Apt 2 | | | | Eligibility Status |

CRISIS /DTW/MR
PROGRAM REFERRALS

Figure 61

You first must explain the Limits of Confidentiality to the Participant. You will find script prompts in some areas of the page for you.

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

"Please be advised the 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, including sexual assault involving service members, and any present or future illegal activity."

"Do you understand everything I just read to you?"

"Do any of those things I just mentioned apply to you or your situation?"

AIR FORCE SERVICE MEMBERS AND FAMILY MEMBERS ONLY:

"For Personnel Reliability Program (PRP) certified participants, reporting any concerns related to reliability is also required."

Figure 62



If a Participant is a minor, you will need to enter "Parent/Guardian Info." You can see a "Minor Participant" icon in the "Participant Overview," as well as name(s) of their Parent/Guardian(s).

DASHBOARD

PARTICIPANT OVERVIEW

Name
Jo Marie Zee

Participant ID
585069

Current Address
123 Happy Street
Apt 2
Awesomeville, PA 12345
United States

Preferred Phone
2-222-222-2221
Confidential

Work Phone
3-333-333-3333

Cell Phone
444-444-4444
Confidential

Email Address
BestEmailAddress@AwesomeEmails.com

DOB
2/19/2004

Service Member?
Yes

Relation
Guardian

Pay Grade
W-3

Branch of SVC
Army National Guard

Eligibility Status
Active Duty

Assigned Installation
Camp Parks Reserve
Forces Training Area

PARENT/GUARDIAN INFO

Name
Bob zee

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

"Please be advised the 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, including sexual assault involving service members, and any present or future illegal activity."

"Do you understand everything I just read to you?"

"Do any of those things I just mentioned apply to you or your situation?"

AIR FORCE SERVICE MEMBERS AND FAMILY MEMBERS ONLY:
"For Personnel Reliability Program (PRP) certified participants, reporting any concerns related to reliability is also required."

Minor Participant - Parent/Guardian Info

*Case Initiated by Parent/Guardian? Yes No Parent/Guardian(s) Permitted to Discuss Case

Parent/Guardian Name

"What prompted your call for counseling today?"

*Presenting Problem

"Have you ever been diagnosed with a mental health condition?"

"Have you ever received any mental health treatment?"

"Have you ever been prescribed any medications for a mental health condition?"

Referral Assessment

Select all that apply:

Participant's Risk to Self Domestic Abuse

Participant's Risk to Other Child Abuse

Figure 63



Was the “Case Initiated by Parent/Guardian?” If so, select the name of the Parent/Guardian initiating the case. Also, select and add all “Parent/Guardians Parent/Guardian(s) Permitted to Discuss Case.”

Minor Participant - Parent/Guardian Info

*Case Initiated by Parent/Guardian? Yes No

*Parent/Guardian Name

Parent/Guardian(s) Permitted to Discuss Case

zee, Bob [Remove](#)

Figure 64

You will make selections based on your “Referral Assessment” of the Participant. Once you understand the reason for the call, select the appropriate “Presenting Problem” from the list. This will trigger different workflows depending on the answer. If the reason for the call is “Outside Scope of MOS,” you will continue with [creating an “Outside Scope for Non-Medical Counseling” case](#). If any other “Presenting Problem” is selected, you will move forward with [creating an “In Scope for Non-Medical Counseling” case](#).

“What prompted your call for counseling today?”

*Presenting Problem

Please Select

Outside Scope of MOS

E66.9 Overweight or Obesity

Z55.9 Academic or Educational Problem

Z56.82 Problem Related to Current Military Deployment Status

Z56.9 Other Problem Related to Employment

Figure 65



7.3.1. CREATE AN OUTSIDE SCOPE FOR NON-MEDICAL COUNSELING CASE

When [creating a Non-Medical Counseling case](#), you may determine it is Outside Scope for Non-Medical Counseling.

“What prompted your call for counseling today?”

*Presenting Problem

Please Select

- Please Select
- Outside Scope of MOS
- E66.9 Overweight or Obesity
- Z55.9 Academic or Educational Problem
- Z56.82 Problem Related to Current Military Deployment Status
- Z56.9 Other Problem Related to Employment

Figure 66

You then will select agencies in which to provide Referrals for the Participant.

If the call is related to any “Tracked Event(s)” in the system, you will select those as well.

Referrals

Select all that apply:

- Child Protective Services
- Clinical Mental Health Care
- Community Service
- Family Advocacy
- Judge Advocate General
- Local Hospital

Tracked Event(s)

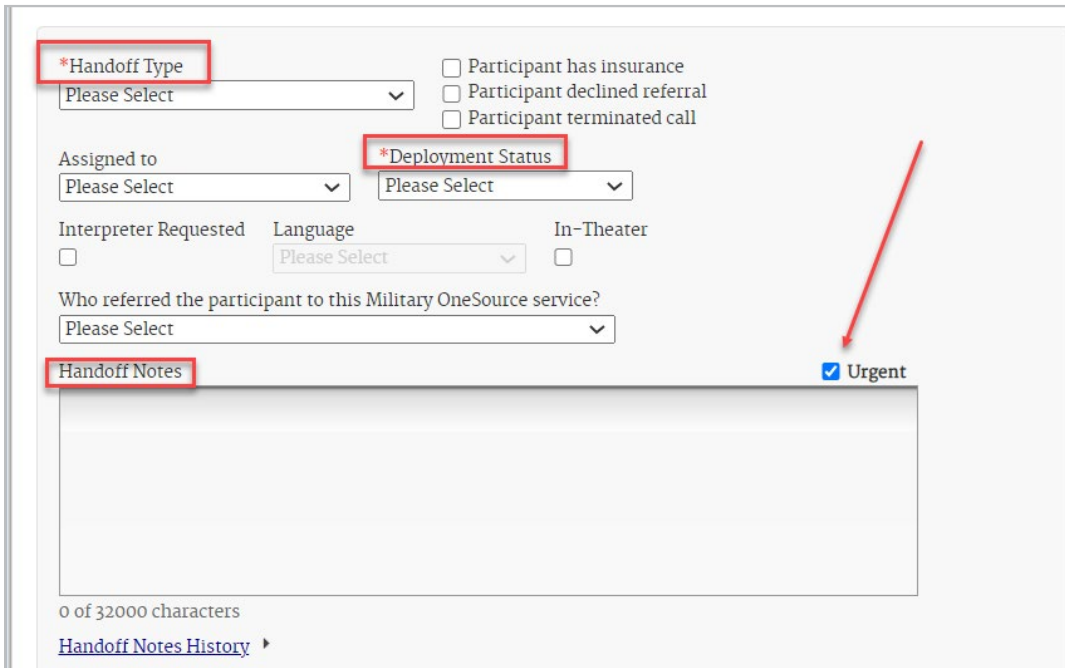
- COVID-19
- Program Study Consent
- Test Production Entry
- My new list item

Figure 67



You must enter the “Handoff Type” and “Deployment Status.” There are additional fields you should answer if possible.

Detail any Handoff Notes to help other users understand the circumstances and/or needs of the Participant. Mark the box for “Urgent” cases.



*Handoff Type
Please Select

Assigned to
Please Select

*Deployment Status
Please Select

Participant has insurance
Participant declined referral
Participant terminated call

Interpreter Requested Language Please Select In-Theater

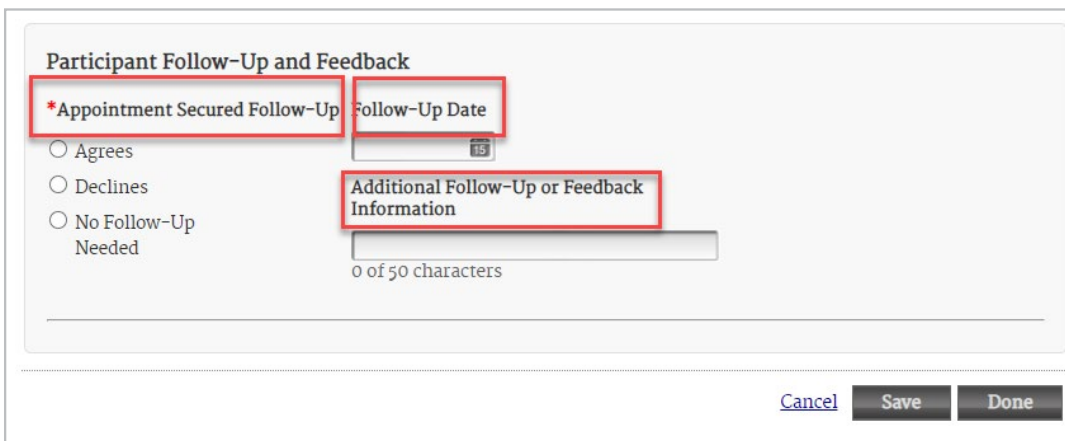
Who referred the participant to this Military OneSource service?
Please Select

Handoff Notes Urgent

0 of 32000 characters
[Handoff Notes History](#)

Figure 68

Lastly, you must offer a Follow-Up appointment and enter the details in the form.



Participant Follow-Up and Feedback

*Appointment Secured Follow-Up Follow-Up Date

Agrees
 Declines
 No Follow-Up Needed

Additional Follow-Up or Feedback Information
0 of 50 characters

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

Figure 69

Click “Save” to save and review the form. Click “Done” to save and return to the Participant record. The newly created case can be found in the Participant’s “[Related Cases](#)” when [viewing the Participant](#), with the most recently created case on top.



7.3.2. CREATE AN IN SCOPE FOR NON-MEDICAL COUNSELING CASE

When [creating a Non-Medical Counseling case](#), you may determine it is In Scope for Non-Medical Counseling.

“What prompted your call for counseling today?”

*Presenting Problem

Z55.9 Academic or Educational Problem

Please Select

Outside Scope of MOS

E66.9 Overweight or Obesity

Z55.9 Academic or Educational Problem

Z56.82 Problem Related to Current Military Deployment Status

Figure 70

You will then enter the Participant’s “Counseling Preference,” “Type of Counseling” needed, and whether the “Referral Type” is “MFLC” or “MOS Network.”

*Counseling Preference Please Select

*Type of Counseling Requested

Individual

Couple

Family

Participant is within 40 miles of MFLC installation

Participant accepts MFLC services

*Referral Type

MFLC

MOS Network

Figure 71

If it is a “MOS Referral” for couple or family counseling, you will be able to add and/or associate family members to participate in the counseling sessions.



“MOS Referrals” also require a “Reason Requesting Counseling” and provide a way to enter provider information.

You can track in the system if a “Participant prefers not to be contacted for follow-up,” as well as if you were “Unable to schedule for appointment within 3 business days.”

If the call is related to any “Tracked Event(s)” in the system, you will select those next.

The screenshot shows a web form for MOS Referrals. At the top, there are radio buttons for "Individual" (selected), "Couple", and "Family". To the right, there is a checkbox for "Participant accepts MFCO services" and a section for "*Referral Type" with radio buttons for "MFLC" and "MOS Network" (selected). Below this, the "MOS Network" section is highlighted with a red box. It contains a text input field for "*Reason Requesting Counseling" (highlighted with a red box) and a dropdown menu for "Authorization Number". Below the text input is a character count "0 of 500 characters". There are three text input fields for "Provider Name", "Phone", and "Location". Below these are two checkboxes: "Participant prefers not to be contacted for follow-up" (highlighted with a red box) and "Unable to schedule for appointment within 3 business days" (highlighted with a red box). At the bottom, there is a section for "Tracked Event(s)" (highlighted with a red box) with two checkboxes: "COVID-19" and "Program Study Consent" (both highlighted with red boxes).

Figure 72



You must enter the “Handoff Type” and “Deployment Status.” There are additional fields you should answer if possible.

Detail any Handoff Notes to help other users understand the circumstances and/or needs of the Participant.

The screenshot displays a web form for case management. At the top left, there is a red-bordered box around the text “*Handoff Type” above a dropdown menu with “Please Select” and a downward arrow. To its right is the “Assigned to” dropdown, also with “Please Select” and a downward arrow. Below these is another red-bordered box around “*Deployment Status” above a “Please Select” dropdown. Further down, there are three fields: “Interpreter Requested” with an unchecked checkbox, “Language” with a “Please Select” dropdown, and “In-Theater” with an unchecked checkbox. Below these is the question “Who referred the participant to this Military OneSource service?” with a “Please Select” dropdown. At the bottom of the form is a red-bordered box around the “Handoff Notes” label, followed by a large text area and an unchecked “Urgent” checkbox. Below the text area, it says “0 of 32000 characters” and includes a link “Handoff Notes History” with a right-pointing arrow.

Figure 73



Lastly, you must offer a Follow-Up appointment and ask if the Participant would be willing to provide "Satisfaction Feedback." Depending on their answers, you may be required to enter additional information.

Participant Follow-Up and Feedback

***Appointment Secured Follow-Up**

Follow-Up Date

Agrees

Phone Call

Text

Declines

No Follow-Up Needed

***Satisfaction Feedback**

Agrees
(Choose both if applicable)

Phone Call

E-mail

Declines

N/A (use when participant is under 18)

Additional Follow-Up or Feedback Information

0 of 50 characters

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

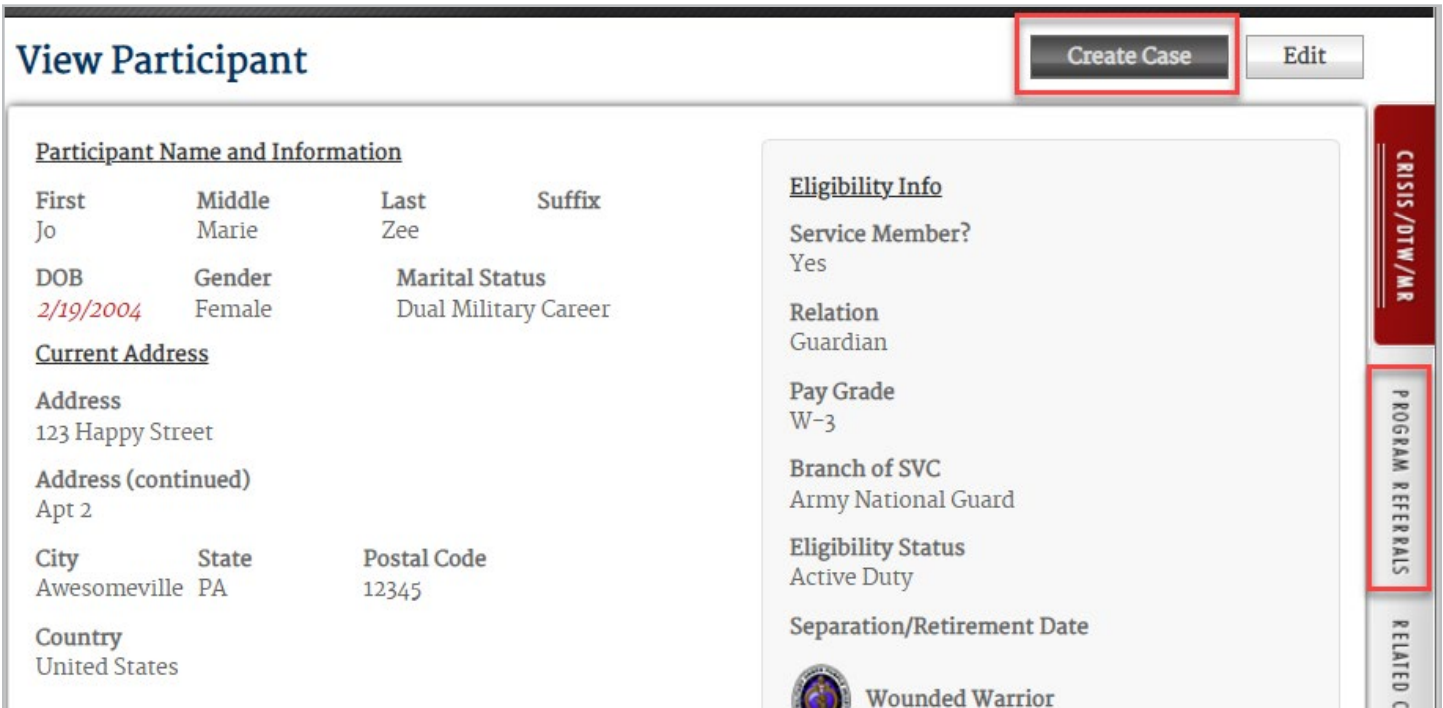
Figure 74

Click "Save" to save and review the form. Click "Done" to save and return to the Participant record. The newly created case can be found in the Participant's "[Related Cases](#)," with the most recently created case on top. You will find information on how to [manage Non-Medical Counseling cases](#) here.




7.4. Create a SECO Triage Case

A case can be created for a Participant while viewing their Participant record or one of their cases. From the Participant record, you can select "Create Case" to open the navigation list of Case Types to choose from. If viewing a case, simply select the "Program Referrals" tab on the right of your screen.



View Participant **Create Case**

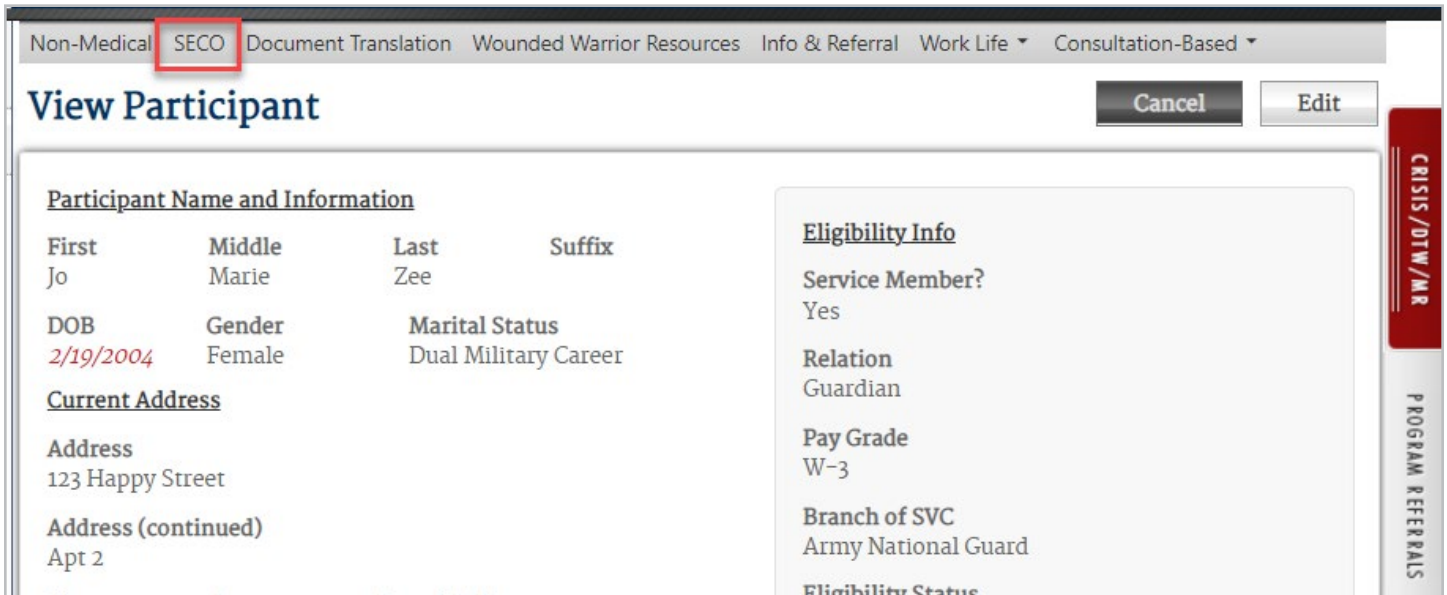
| <u>Participant Name and Information</u> | | | | <u>Eligibility Info</u> | |
|---|--------|----------------------|--------|---|--|
| First | Middle | Last | Suffix | Service Member? | |
| Jo | Marie | Zee | | Yes | |
| DOB | Gender | Marital Status | | Relation | |
| 2/19/2004 | Female | Dual Military Career | | Guardian | |
| <u>Current Address</u> | | | | | |
| Address | | | | | |
| 123 Happy Street | | | | | |
| Address (continued) | | | | | |
| Apt 2 | | | | | |
| City | State | Postal Code | | Pay Grade | |
| Awesomeville | PA | 12345 | | W-3 | |
| Country | | | | | |
| United States | | | | | |
| | | | | Branch of SVC | |
| | | | | Army National Guard | |
| | | | | Eligibility Status | |
| | | | | Active Duty | |
| | | | | Separation/Retirement Date | |
| | | | |  Wounded Warrior | |

CRISIS /DTW/MR
PROGRAM REFERRALS
RELATED C

Figure 75



Select "SECO."



Non-Medical **SECO** Document Translation Wounded Warrior Resources Info & Referral Work Life Consultation-Based

View Participant

Cancel Edit

| Participant Name and Information | | | |
|----------------------------------|--------|----------------------|--------|
| First | Middle | Last | Suffix |
| Jo | Marie | Zee | |
| DOB | Gender | Marital Status | |
| 2/19/2004 | Female | Dual Military Career | |
| Current Address | | | |
| Address | | | |
| 123 Happy Street | | | |
| Address (continued) | | | |
| Apt 2 | | | |

| Eligibility Info |
|---------------------|
| Service Member? |
| Yes |
| Relation |
| Guardian |
| Pay Grade |
| W-3 |
| Branch of SVC |
| Army National Guard |
| Eligibility Status |

CRISIS/DTW/MR
PROGRAM REFERRALS

Figure 76



If the call is related to any “Tracked Event(s)” in the system, you will select those next.

You must enter the “Handoff Type” and “When did the handoff occur?” There are additional fields you should answer if possible.

Detail any Handoff Notes to help other users understand the circumstances and/or needs of the Participant.

SECO Triage

Tracked Event(s)

- COVID-19
- Program Study Consent
- Test Production Entry
- My new list item

***Handoff Type**
Please Select

***When did the handoff occur?**
Please Select

Assigned to
Please Select

Interpreter Requested Language
Please Select

Who referred the participant to this Military OneSource service?
Please Select

Handoff Notes

0 of 32000 characters

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

Figure 77



Click "Save" to save and review the form. Click "Done" to save and return to the Participant record. The newly created case can be found in the Participant's "Related Cases," with the most recently created case on top.

7.5. Create a SECO Specialty Consult and/or Spouse Group (Coming Soon) Case

You must start with an active SECO Triage Case for a Participant. If one exists, it can be found in the "Related Cases" tab when [viewing the Participant](#). If one does not exist, you will need to [create a SECO Triage Case](#).

Enter information concerning My Career Advancement Account, or MyCAA, and Military Spouse Employment Partnership, or MSEP, eligibility and participation, to include "Service Member Name."

SECO Triage
Case ID: 985193 (Active)

Tracked Event(s)
None

Handoff Type
None - Participant Requests Callback

When did the handoff occur?
During Working Hours

Assigned to

Language
 Interpreter Requested

Who referred the participant to this Military OneSource service?

[Assignment History](#) ▾

Handoff Notes Urgent

rg et re ter ertt rte

Date and Time of Call: Saturday, April 17, 2021 10:18 PM UTC
Created By: Lisa Greer #7265

Service Member Name

0 of 50 characters

MyCAA Eligible
 MyCAA Registered
 MyCAA Participant
 MSEP Registered
 MyCAA Manadatory Counseling Complete

SECO Service Request (select all that apply)
 SECO Information & Referral
 SECO Specialty Consult

Figure 78



Under "SECO Service Request," select "SECO Information and Referral" if it applies to the Participant and select all referrals that apply. Add relevant "Comments" as well.

SECO Service Request (select all that apply)

SECO Information & Referral

SECO I&R

| Spouse Requests* | Tech Help Provided For | Warm Handoff to MOS |
|--|---|---|
| <input type="checkbox"/> MyCAA Scholarship Information | <input type="checkbox"/> DEERS Eligibility | <input type="checkbox"/> Childcare |
| <input type="checkbox"/> Career Exploration | <input type="checkbox"/> DS Logon | <input type="checkbox"/> Health & Wellness |
| <input type="checkbox"/> Job Search Assistance | <input type="checkbox"/> MyCAA Portal | <input type="checkbox"/> Non-Medical Counseling |
| <input type="checkbox"/> LinkedIn Premium | <input type="checkbox"/> MySECO Website | <input type="checkbox"/> Personal Finance |
| <input type="checkbox"/> Tech Help | <input type="checkbox"/> Overseas Tech Issues | <input type="checkbox"/> Relocation |
| <input type="checkbox"/> Other | <input type="checkbox"/> Other | <input type="checkbox"/> Other |

0 of 50 characters

0 of 50 characters

Comments

0 of 32000 characters

SECO Specialty Consult

Figure 79



Under “SECO Service Request,” select “SECO Specialty Consult” and/or “SECO Spouse Group” to create one or both case types for the Participant. For each of these, the process is the same.

Service Member Name
0 of 50 characters

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

SECO Service Request (select all that apply)

SECO Information & Referral
 SECO Specialty Consult

Figure 80

If the case is related to any “Tracked Event(s)” in the system, you will select those next.

You must enter the “Handoff Type” and scheduled a Follow-Up, completing those fields. There are additional fields you should answer if possible.

Detail any Handoff Notes to help other users understand the circumstances and/or needs of the Participant for this specific case.



SECO Specialty Consult

Tracked Event(s)

- COVID-19
- Program Study Consent
- Test Production Entry
- My new list item

Handoff Type* Assigned To

Please Select Please Select

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

15 0 of 50 characters

Handoff Notes Urgent

Figure 81

Click "Save" to save and review the form. Click "Done" to save and return to the Participant record. The newly created case can be found in the Participant's "[Related Cases](#)," with the most recently created case on top. You will find information on how to [manage SECO cases](#) here.



7.6. Create a Document Translation Case

A case can be created for a Participant while viewing their Participant record or one of their cases. From the Participant record, you can select "Create Case" to open the navigation list of Case Types to choose from. If viewing a case, simply select the "Program Referrals" tab on the right of your screen.

View Participant Create Case Edit

Participant Name and Information

| | | | |
|-----------|--------|----------------------|--------|
| First | Middle | Last | Suffix |
| Jo | Marie | Zee | |
| DOB | Gender | Marital Status | |
| 2/19/2004 | Female | Dual Military Career | |

Current Address

Address
123 Happy Street

Address (continued)
Apt 2

| | | |
|--------------|-------|-------------|
| City | State | Postal Code |
| Awesomeville | PA | 12345 |

Country
United States

Eligibility Info

Service Member?
Yes

Relation
Guardian

Pay Grade
W-3

Branch of SVC
Army National Guard

Eligibility Status
Active Duty

Separation/Retirement Date

Wounded Warrior

CRISIS /DTW/MR

PROGRAM REFERRALS

RELATED C

Figure 82



Select "Document Translation."

Non-Medical SECO **Document Translation** Wounded Warrior Resources Info & Referral Work Life Consultation-Based

View Participant

Cancel Edit

| <u>Participant Name and Information</u> | | | | <u>Eligibility Info</u> | |
|---|--------|----------------------|--------|-------------------------|--|
| First | Middle | Last | Suffix | Service Member? | |
| Jo | Marie | Zee | | Yes | |
| DOB | Gender | Marital Status | | Relation | |
| 2/19/2004 | Female | Dual Military Career | | Guardian | |
| <u>Current Address</u> | | | | Pay Grade | |
| Address | | | | W-3 | |
| 123 Happy Street | | | | Branch of SVC | |
| Address (continued) | | | | Army National Guard | |
| Apt 2 | | | | Eligibility Status | |
| City | State | Postal Code | | Active Duty | |
| Awscomville | PA | 12345 | | | |

CRISIS /DTW/MR
PROGRAM REFERRALS

Figure 83



If the case is related to any “Tracked Event(s)” in the system, you will select those next.

There are then multiple fields to enter information about the document, its owner and the languages of the current and needed document. All information must be entered.

If there are additional document(s) to translate, click “Add Document” and you will be able to answer similar information for the other document(s).

Document Translation

Tracked Event(s)

- COVID-19
- Program Study Consent
- Test Production Entry
- My new list item

Documents

Document Type* From Language* No. of Pages*

Details of Other To Language*

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

Who does the document belong to?*

What is the document owner's relationship to the participant?*

How will the translated document be used (e.g., legal purposes, school enrollment)?*

If the document is for immigration, who is sponsoring the owner of the document?*

Has the document ever been translated before? If so, is the participant able to provide a copy of the previous translation?*

Add Document

Figure 84

Once all documents are detailed, you must enter the “Handoff Type” and “Deployment Status.” There are additional fields you should answer if possible.



Detail any Handoff Notes to help other users understand the circumstances and/or needs of the Participant.

Add Document

*Handoff Type
Please Select

Assigned to
Please Select

*Deployment Status
Please Select

Interpreter Requested Language
Please Select

Who referred the participant to this Military OneSource service?
Please Select

Handoff Notes

0 of 32000 characters

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

Figure 85

Click "Save" to save and review the form. Click "Done" to save and return to the Participant record. The newly created case can be found in the Participant's "[Related Cases](#)," with the most recently created case on top. You will find information on how to [manage Document Translation cases](#) here.



7.7. Create Other Case Types

A case can be created for a Participant while viewing their Participant record or one of their cases. From the Participant record, you can select "Create Case" to open the navigation list of Case Types to choose from. If viewing a case, simply select the "Program Referrals" tab on the right of your screen.

View Participant **Create Case** Edit

| Participant Name and Information | | | |
|----------------------------------|--------|----------------------|--------|
| First | Middle | Last | Suffix |
| Jo | Marie | Zee | |
| DOB | Gender | Marital Status | |
| 2/19/2004 | Female | Dual Military Career | |
| Current Address | | | |
| Address | | | |
| 123 Happy Street | | | |
| Address (continued) | | | |
| Apt 2 | | | |
| City | State | Postal Code | |
| Awesomeville | PA | 12345 | |
| Country | | | |
| United States | | | |

Eligibility Info

Service Member? Yes

Relation Guardian

Pay Grade W-3

Branch of SVC Army National Guard

Eligibility Status Active Duty

Separation/Retirement Date

Wounded Warrior

CRISIS /DTW/MR
PROGRAM REFERRALS
RELATED C

Figure 86

Select the case type you want to create.

Non-Medical SECO Document Translation **Wounded Warrior Resources** Info & Referral Work Life Consultation-Based

View Participant Cancel Edit

| Participant Name and Information | | | |
|----------------------------------|--------|----------------------|--------|
| First | Middle | Last | Suffix |
| Jo | Marie | Zee | |
| DOB | Gender | Marital Status | |
| 2/19/2004 | Female | Dual Military Career | |
| Current Address | | | |
| Address | | | |
| 123 Happy Street | | | |
| Address (continued) | | | |

Eligibility

Service M Yes

Relation Guardian

Pay Grade W-3

Branch of SVC Army National Guard

CRISIS /DTW/MR
PROGRAM REFER

Work Life
Financial
Tax
Elder Care
Education
Adult Disability
Adoption

Figure 87



Non-Medical SECO Document Translation Wounded Warrior Resources Info & Referral Work Life

View Participant

Participant Name and Information

| First | Middle | Last | Suffix |
|-------|--------|------|--------|
| Jo | Marie | Zee | |

DOB: 2/19/2004 Gender: Female Marital Status: Dual Military Career

Current Address

Address: 123 Happy Street

Address (continued): Apt 2

| City | State | Postal Code |
|--------------|-------|-------------|
| Awesomeville | PA | 12345 |

Country: United States

Eligibility Info

Service Member? Yes

Relation: Guardian

Pay Grade: W-3

Branch of SVC: Army National Guard

Eligibility Status: Active Duty

Separation/Retirement Date

Consultation-Based

- Health & Wellness
- Special Needs
- Peer Support
- Spouse Relocation
- Healthy Relationships
- New MilParent
- Transitioning Veteran

CRISIS /DTW/MR

PROGRAM REFERRALS

RELATED C

Figure 88

If the case is related to any “Tracked Event(s)” in the system, you will select those next. Mark each referral needed.

You must enter the “Handoff Type” and “Deployment Status.” There are additional fields you should answer if possible.

Detail any Handoff Notes to help other users understand the circumstances and/or needs of the Participant.



Tracked Event(s)

- COVID-19
- Program Study Consent
- Test Production Entry
- My new list item

Select the referrals needed for the participant below:

- Career
- Community Resources
- Financial Assistance
- Government Program
- Household Services
- Housing
- Legal
- Non-Referral General Information
- Pets
- Official Travel
- Unofficial Travel

***Handoff Type** Assigned to

***Deployment Status**

Interpreter Requested Language

Who referred the participant to this Military OneSource service?

Handoff Notes Urgent

0 of 32000 characters

[Cancel](#)

Figure 89

Click "Save" to save and review the form. Click "Done" to save and return to the Participant record. The newly created case can be found in the Participant's "[Related Cases](#)" when [viewing the Participant](#), with the most recently created case on top. You will find information on how to [manage these cases](#) here.



7.8. Accessing Participant's Existing Cases

Go to a case by selecting it from your [dashboard](#), from the **“Related Cases” tab** in the right panel when [viewing a Participant's record](#), or by [searching for it by “Case Number.”](#)

When viewing a Participant record, there is a tab on the right for “Related Cases.”

View Participant

Create Case
Edit

Participant Name and Information

| | | | |
|-----------|--------|----------------------|--------|
| First | Middle | Last | Suffix |
| Jo | Marie | Zee | |
| | | | |
| DOB | Gender | Marital Status | |
| 2/19/2004 | Female | Dual Military Career | |

Current Address

Address
123 Happy Street

Address (continued)
Apt 2

| | | |
|--------------|-------|-------------|
| City | State | Postal Code |
| Awesomeville | PA | 12345 |

Country
United States

Telephone

| | |
|-----------------|----------------|
| Preferred Phone | Work Phone |
| 2-222-222-2221 | 3-333-333-3333 |
| Confidential | Cell Phone |
| | 444-444-4444 |
| | Confidential |

Eligibility Info

Service Member?
Yes

Relation
Guardian

Pay Grade
W-3

Branch of SVC
Army National Guard

Eligibility Status
Active Duty

Separation/Retirement Date

Wounded Warrior

Minor Participant

Assigned Installation
Camp Parks Reserve Forces Training Area

CRISIS/DTW/MR

PROGRAM REFERRALS

RELATED CASES

NOTES

Figure 90



The “Related Cases” tab takes you to a list of all cases this Participant has had, with the most recent cases at the top of the list.

Related Cases

| Related Cases | | | | |
|--------------------------|--|----------------------|----------------------|----------------------|
| Case Id | Case Name | Date Opened | Date Modified | Status |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| ▶ 988307 | Specialty Consult: Peer Support | 7/27/2021 | 7/27/2021 | Active |
| ▶ 986094 | SECO Specialty Consult | 6/30/2021 | 7/1/2021 | Active |
| ▶ 986093 | SECO Triage | 6/30/2021 | 7/1/2021 | Active |
| ▶ 985195 | Specialty Consult: New MilParent Support | 4/18/2021 | 4/26/2021 | Active |
| ▶ 985194 | Non-Medical Counseling | 4/17/2021 | 5/10/2021 | Closed |
| ▶ 985193 | SECO Triage | 4/17/2021 | 4/17/2021 | Active |
| ▶ 985192 | Non-Medical Counseling | 4/17/2021 | 4/18/2021 | Active |
| ▶ 985190 | Financial Counseling | 4/17/2021 | 4/17/2021 | Active |
| ▶ 985189 | Specialty Consult: Education | 4/17/2021 | 4/18/2021 | Active |
| ▶ 985119 | Non-Medical Counseling | 4/10/2021 | 4/10/2021 | Active |

5 20 30 Page 1 of 7 (66 items) 2 3 4 5 6 7

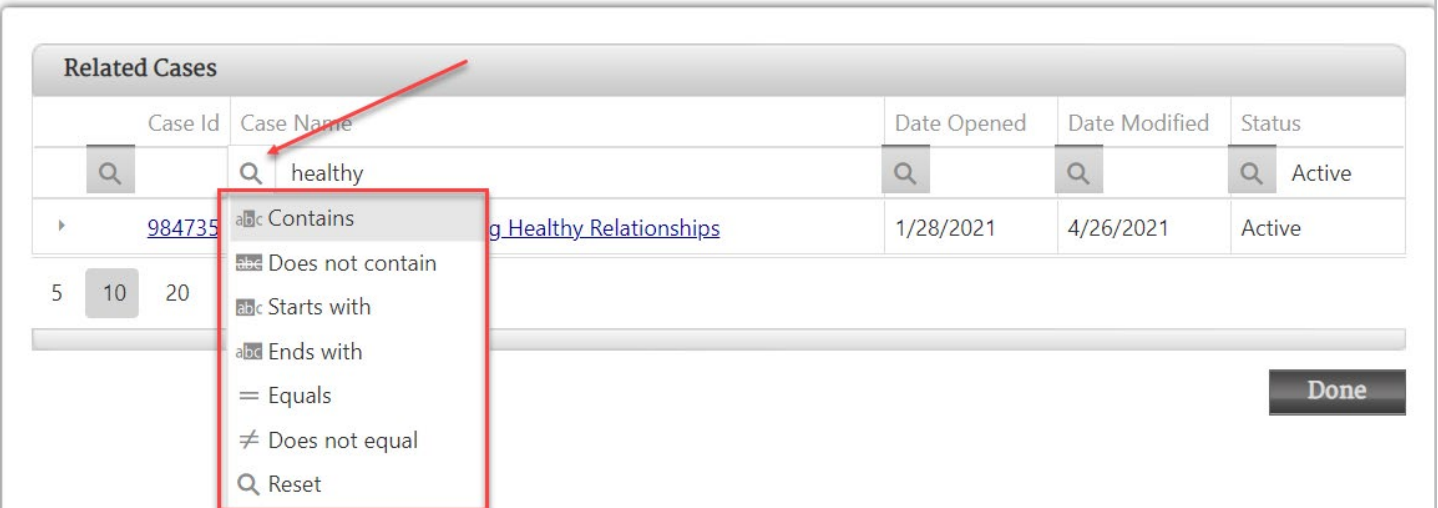
Done

Figure 91



Each column allows filtering options for the report. Hover over the search icon in a column to select the option you want.

Related Cases



| Case Id | Case Name | Date Opened | Date Modified | Status |
|-------------------------------|---|-------------------------------|-------------------------------|-------------------------------------|
| <input type="text" value=""/> | <input type="text" value="healthy"/> | <input type="text" value=""/> | <input type="text" value=""/> | <input type="text" value="Active"/> |
| ▶ 984735 | Specialty Consult: Building Healthy Relationships | 1/28/2021 | 4/26/2021 | Active |

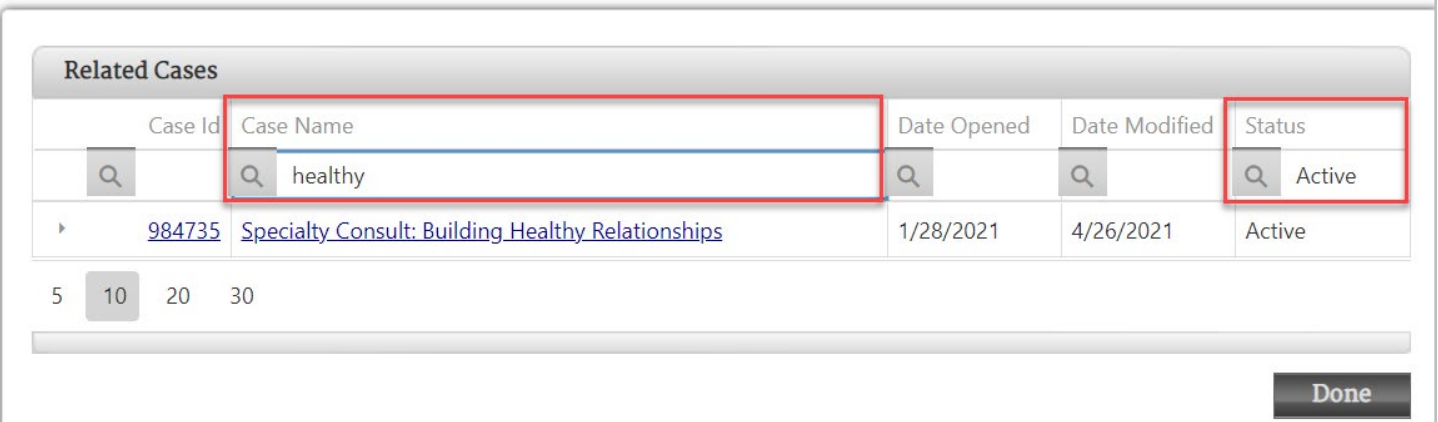
5 | 10 | 20

Done

Figure 92

Here you see all Active cases that have “healthy” in the Case Name.

Related Cases



| Case Id | Case Name | Date Opened | Date Modified | Status |
|-------------------------------|---|-------------------------------|-------------------------------|-------------------------------------|
| <input type="text" value=""/> | <input type="text" value="healthy"/> | <input type="text" value=""/> | <input type="text" value=""/> | <input type="text" value="Active"/> |
| ▶ 984735 | Specialty Consult: Building Healthy Relationships | 1/28/2021 | 4/26/2021 | Active |

5 | 10 | 20 | 30

Done

Figure 93



Clicking either the Case ID or Case Name will take you to [manage the case](#).

Related Cases

| Related Cases | | | | | |
|---------------|------------------------|--|----------------------|----------------------|----------------------|
| | Case Id | Case Name | Date Opened | Date Modified | Status |
| | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| ▶ | 988307 | Specialty Consult: Peer Support | 7/27/2021 | 7/27/2021 | Active |
| ▶ | 986094 | SECO Specialty Consult | 6/30/2021 | 7/1/2021 | Active |
| ▶ | 986093 | SECO Triage | 6/30/2021 | 7/1/2021 | Active |
| ▶ | 985195 | Specialty Consult: New MilParent Support | 4/18/2021 | 4/26/2021 | Active |
| ▶ | 985194 | Non-Medical Counseling | 4/17/2021 | 5/10/2021 | Closed |

Figure 94



8. Managing Cases and Sessions

The following information outlines the processes for managing your cases within the eCMS. While working on your cases, save your work frequently by selecting the Save button. Exit your case at any point by selecting the Done button at the bottom of the page (selecting Done will also save the file). Go to a case by selecting it from your [dashboard](#), from the [“Related Cases”](#) tab in the right panel when [viewing a Participant’s record](#), or by [searching for it by “Case Number.”](#)

8.1. Overview

The following information outlines the processes for managing cases within the eCMS. While working on your cases, save your work frequently by selecting the Save button. Exit your case at any point by selecting the Done button at the bottom of the page (selecting Done will also save the file). Return to the case management screen at any time by selecting it from the [“Related Cases”](#) tab in the right panel.

8.2. Manage Non-Medical Counseling Cases

[Search for the case ID](#) of the case you need to manage or find it in the Participant’s [“Related Cases”](#) tab when [viewing the Participant](#). Click the link to open the case.

If the case is [“Outside Scope for Non-Medical Counseling,”](#) the Participant can have Follow-Ups scheduled and Contact Notes can be added, but not much else is tracked. The case can be closed by selecting “Completed.”



Scope Determination:
Outside Scope for Non-Medical Counseling

Referrals
Community Service

Participant has insurance
No

Participant declined referral
No

Participant terminated call
No

Tracked Event(s)
None

Handoff Type
Warm Handoff

[Handoff Notes History](#) ▶

Participant Follow-Up and Feedback

***Appointment Secured Follow-Up Follow-Up Date**

Agrees

Declines

No Follow-Up Needed

Additional Follow-Up or Feedback Information

0 of 50 characters

[Follow-Up History](#) ▶

Unable to schedule for appointment within 3 business days

Closing Reason
Please Select ▼

Completed

Contact Notes [add](#)

Void

[Cancel](#) Save Done

Figure 95



For cases that are "In Scope for Non-Medical Counseling," information for the MOS Network Provider should be entered once know.

If it is for couple or family counseling, you will be able to add, update and/or associate family members to participate in the counseling sessions.

In Scope

Counseling Preference: In-person NmcoCounselingPreferenceBack

Type of Counseling Requested: Couple

Handoff Type: None - Participant Requests Callback

Participant is within 40 miles of MFLC installation: No

Participant accepts MFLC services: No

Referral Type: MOS Network

Tracked Event(s)
None

MOS Network

[Handoff Notes History](#) ▾

Authorization Number: *Provider Name:

Reason Requesting Counseling: needed Phone:

*Location:

Case Participants [add](#) [select](#)

You have not selected any family members to participate in the counseling sessions. Please use the 'add' link to add family members to participant and use the 'select' link to select the family members who will be participating in counseling sessions.

Figure 96



While on the case management screen, you will select the “Completed” box for the Follow-Up that has occurred.

The screenshot shows a user interface for case management. At the top right, there is a button labeled "+ Add Session". Below this, the text "Participant prefers not to be contacted for follow-up: No" is displayed. The main content area is divided into two columns. The left column is titled "*Appointment Secured Follow-Up" and includes the text "Agrees" with a sub-item "• Phone Call". The right column is titled "*Satisfaction Feedback" and includes the text "Agrees" with a sub-item "• E-mail". Below these columns, there is a table with three columns: "Follow-Up or Feedback Date", "Additional Follow-Up or Feedback Information", and "Follow-Up / Feedback Outcome". The first row in the table shows the date "4/27/2021" under the first column, an empty field under the second column, and a dropdown menu under the third column with the text "Please Select". To the right of the dropdown menu is a checkbox labeled "Completed", which is highlighted with a red border. At the bottom left of the form, there is a link labeled "Follow-Up History" with a right-pointing arrow.

Figure 97



Select the "Follow-Up / Feedback Outcome" and update the fields for an additional Follow-Up, if one is being scheduled.

[+ Add Session](#)

Participant prefers not to be contacted for follow-up: No

***Appointment Secured Follow-Up**

Agrees

- Phone Call

***Satisfaction Feedback**

Agrees

- E-mail

| | | | |
|----------------------------|--|---|---|
| Follow-Up or Feedback Date | Additional Follow-Up or Feedback Information | Follow-Up / Feedback Outcome Please Select ▼ | <input checked="" type="checkbox"/> Completed |
| 4/27/2021 | | | |

Participant Follow-Up and Feedback

| | | | |
|---|---|--|--|
| *Appointment Secured Follow-Up | Follow-Up Date | *Satisfaction Feedback | |
| <input checked="" type="radio"/> Agrees <ul style="list-style-type: none"> <input checked="" type="radio"/> Phone Call <input type="radio"/> Text <input type="radio"/> Declines <input type="radio"/> No Follow-Up Needed | <input type="text" value="15"/> Additional Follow-Up or Feedback Information <input type="text"/> <small>0 of 50 characters</small> | <input checked="" type="radio"/> Agrees <small>(Choose both if applicable)</small> <ul style="list-style-type: none"> <input type="checkbox"/> Phone Call <input checked="" type="checkbox"/> E-mail <input type="radio"/> Declines <input type="radio"/> N/A (use when participant is under 18) | |

[Follow-Up History](#) ▾

Figure 98

In Non-Medical cases the Participant can attend sessions. To enter information related to a session, click "+Add Session."

MOS Network [Edit](#)

Authorization Number:

Reason Requesting Counseling: need

[Handoff Notes History](#) ▾

***Provider Name:** jim smith

Phone: 444-555-4545

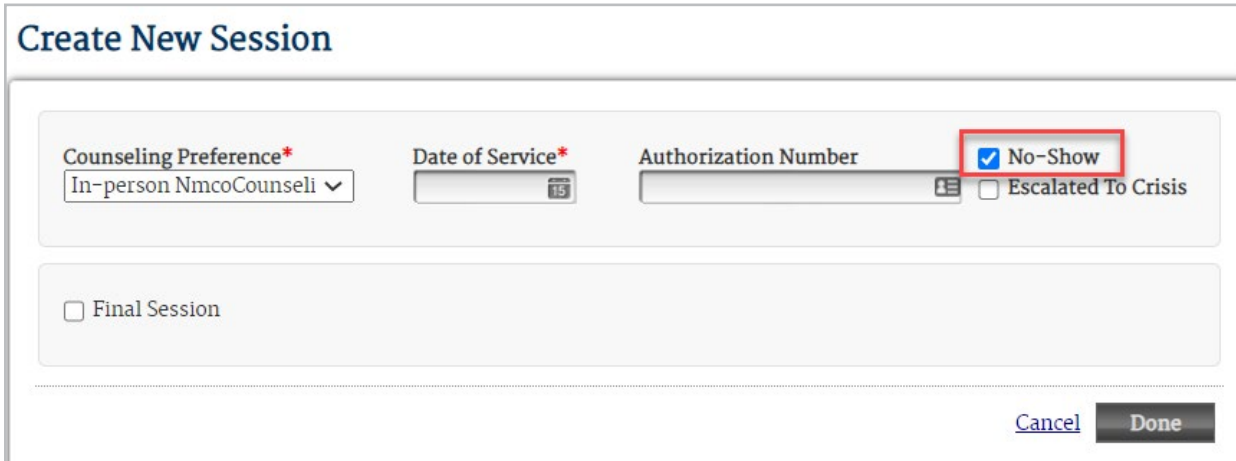
***Location:** here

[+ Add Session](#)

Figure 99



If the Participant did not show up for the session, click “No Show.” Most of the fields will disappear. Fill out remaining fields and click “Done” to save.



Create New Session

Counseling Preference* In-person NmcoCounseli v

Date of Service* [calendar icon]

Authorization Number [calendar icon]

No-Show

Escalated To Crisis

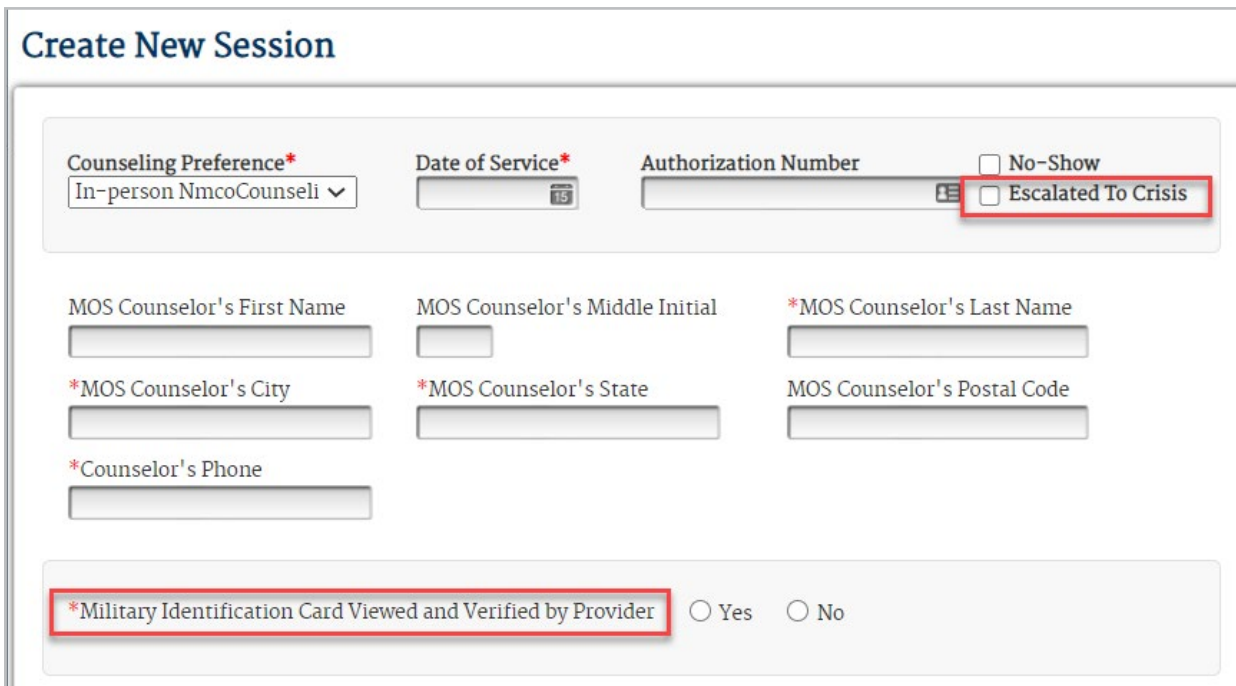
Final Session

[Cancel](#) **Done**

Figure 100

Otherwise, you will enter “Counseling Preference” and information related to the Counselor. Mark if the case has been “Escalated to Crisis.”

You should note that the “Military Identification Card Viewed and Verified by Provider” when possible.



Create New Session

Counseling Preference* In-person NmcoCounseli v

Date of Service* [calendar icon]

Authorization Number [calendar icon]

No-Show

Escalated To Crisis

MOS Counselor's First Name [text box]

MOS Counselor's Middle Initial [text box]

*MOS Counselor's Last Name [text box]

*MOS Counselor's City [text box]

*MOS Counselor's State [text box]

MOS Counselor's Postal Code [text box]

*Counselor's Phone [text box]

*Military Identification Card Viewed and Verified by Provider Yes No

Figure 101



Select the “Assessed Problem Category” that most accurately represents the session.

For each “Presenting and Assessed Problems” listed, note if it is “Presenting,” “Assessed” or both.

Have Participant rate the severity of their problem prior to starting counseling and their ability to address it now.

If more “Presenting and Assessed Problems” are needed, select one from the drop-down and click “Add Additional Problem” for each relevant one. You also must answer all questions related to each problem.

The screenshot shows a web form interface. At the top, there is a dropdown menu labeled "Assessed Problem Category" with "Please Select" and a downward arrow. Below this is a section titled "Presenting and Assessed Problems*" containing a sub-section "Z55.9 Academic or Educational Problem" with a "remove" link. Underneath are two radio buttons for "Presenting" and "Assessed". Two questions follow: "Thinking about this problem before you connected with me for counseling, how would you rate the severity of your problem?" and "How is your ability to address your issue as compared to when we started counseling?". Each question has a "Please Select" dropdown menu. At the bottom, there is another "Please Select" dropdown menu and a button labeled "Add Additional Problem". Red boxes highlight the top dropdown menu and the bottom dropdown menu and button.

Figure 102



Next you will encounter questions about the relationship of the problem to certain military situations, its risk and legal requirements.

***High Risk Case** Yes No

***Reviewed with MOS Consultant** Yes No

If yes with whom? (Consultant's name)

***Safety Plan Developed?** Yes No

***Has a legally required report** Yes No
been filed?

Legally required report filed by whom?

Legally required report filed when?

Legally required report filed where?

0 of 4000 characters

Figure 103

The Participant must leave the session with one to three goals, and the status of the goal(s) must be tracked.

There is a place for you to add “Collateral Notes.”

Counseling Goals

1. *

2.

3.

Collateral Notes

0 of 32000 characters

Figure 104



Near the bottom of the screen, you will see a tab for “Individual Case Details,” with one or more individuals next to plus signs. The first is the Participant, and all others are family members who attended the session. Click each row one by one to expose additional questions.



Figure 105

Ensure you have the “Statement of Understanding Signed,” and perform a “Risk and Functional Assessment.”



Individual Case Details

alexis Carrington No-Show

*Statement of Understanding Signed Yes No

*Does member have any diagnosis on Axis I or II beyond a V code? Yes No
(If yes, refer to a clinical provider)

Risk and Functional Assessment
(Participant's level of impairment at session)
0 = No evidence of impairment; 1 = mild; 2 = moderate; 3 = severe impairment

| | Level of Impairment | | | |
|--|----------------------------------|----------------------------------|-----------------------|-----------------------|
| | 0 | 1 | 2 | 3 |
| Member's Risk To Self | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Member's Risk To Others | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Mood Disturbances (Depression or Mania) | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Anxiety | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Thinking / Cognition / Memory / Concentration | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Impulse / Reckless / Aggressive Behavior | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Activities of Daily Living Problems | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Medical / Physical Condition | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Substance Abuse / Dependence | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Job / School Performance | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Social Functioning / Relationship / Marital / Family | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Test NmcoMosAarRiskFunctionalAssessment_1 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

| | None / Denies | Current | History |
|------------------------|----------------------------------|-----------------------|-----------------------|
| *Domestic Violence | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| *Child Abuse / Neglect | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| *Sexual Assault | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| *Sexual Abuse | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Figure 106

Enter notes for the four assessment questions at the bottom of the form.



***Mental Health Treatment History Assessed?** Yes No

0 of 32000 characters

***Substance Abuse Treatment History Assessed?** Yes No

0 of 32000 characters

***Strength, Skills, Aptitude and Interests Assessed?** Yes No

0 of 32000 characters

***Supports Assessed?** Yes No

0 of 32000 characters

+ [ID: 3887] Partner - Male - 33

Figure 107



For family members you will only need to ensure the Statement of Understanding has been signed.

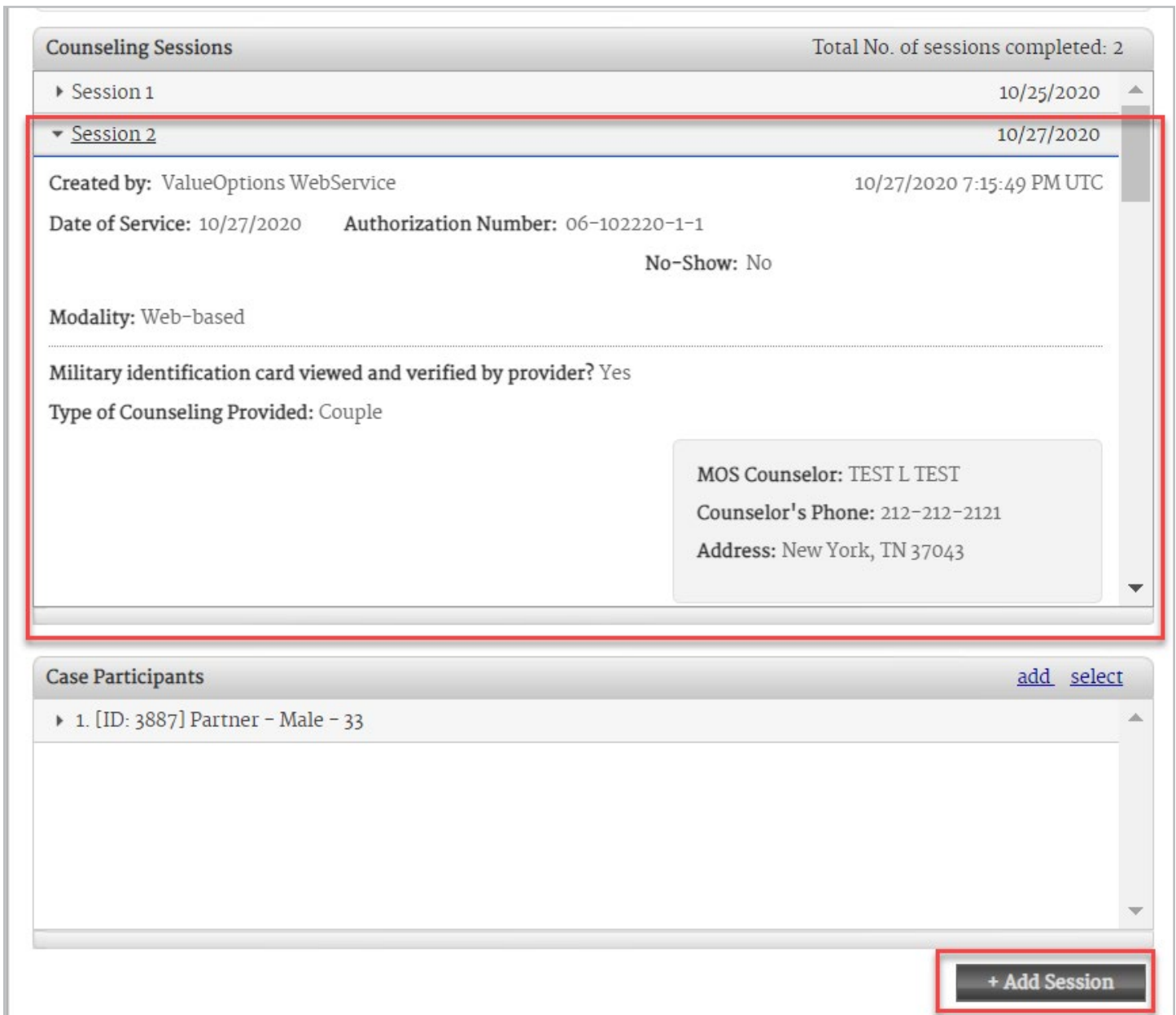
The screenshot shows a web interface for 'Individual Case Details'. The main heading is 'Individual Case Details'. Below it, there is a list of family members. The first entry is '+ alexis Carrington'. The second entry is '- [ID: 3887] Partner - Male - 33'. Below the list, there are fields for 'External Id: -77933' and a checkbox for 'No-Show'. The 'Statement of Understanding Signed' field is highlighted with a red box and has radio buttons for 'Yes' (selected) and 'No'.

Figure 108



Once all questions have been answered and provided the Participant is expected to attend more sessions, you can click “Done.” If this will be the Participant’s final session, you can select “Final Session,” answer all questions for the additional fields that opened and click “Done.”

You will be returned to the case management screen where you can continue making updates to the case. You will see the details from any sessions that have been entered and can add another session, if needed.



| Counseling Sessions | Total No. of sessions completed: 2 |
|---|------------------------------------|
| ▶ Session 1 | 10/25/2020 |
| ▼ Session 2 | 10/27/2020 |
| Created by: ValueOptions WebService 10/27/2020 7:15:49 PM UTC | |
| Date of Service: 10/27/2020 Authorization Number: 06-102220-1-1 | |
| No-Show: No | |
| Modality: Web-based | |
| Military identification card viewed and verified by provider? Yes | |
| Type of Counseling Provided: Couple | |
| MOS Counselor: TEST L TEST Counselor's Phone: 212-212-2121 Address: New York, TN 37043 | |

| Case Participants | add select |
|-------------------------------------|--|
| ▶ 1. [ID: 3887] Partner - Male - 33 | |

+ Add Session

Figure 109

Be sure you select “Done” when you have finished updating the case. The case can still be found in the Participant’s “Related Cases” with the most recently created case on top.



8.3. Manage SECO Specialty Consult and SECO Spouse Group Cases

Search for the case ID of the case you need to manage or find it in the Participant's "Related Cases" tab when viewing the Participant. Click the link to open the case.

Review the Follow-Up information, selecting "Completed" and creating another, if needed.

| Follow-Up Date | Follow-Up Reason | Follow-Up Outcome |
|-------------------|------------------|---|
| 4/10/2021 5:45 AM | eagr | Please Select <input checked="" type="checkbox"/> Completed |

Create Follow-Up

| Follow-Up Date | Follow-Up Time | Follow-Up Reason |
|---------------------------------|---------------------------------|-------------------------------|
| <input type="text" value="15"/> | <input type="text" value="15"/> | <input type="text" value=""/> |

0 of 50 characters

[Follow-Up History](#) ▶

Figure 110



There will be a drop-down for SECO Coaching Services. Select the appropriate option and enter "Session Notes."

Provided the Participant is expected to attend more sessions, you can click "Done" to save the session. If it will be the Participant's final session, enter "Case Closing Summary" and select "Completed." Click Done to save the session and close the case.

SECO Coaching Services

Please Select

Please Select

MyCAA Coaching Session

SECO Coaching Package

Video Mock Interview

On-Demand Resume Review

Leveraging LinkedIn Premium

Session Notes

0 of 4000 characters

Contact Notes [add](#)

0 of 4000 characters

Completed

Void [Cancel](#) Save Done

Figure 111



You will see the details from any sessions that have been entered and can add another session, if needed.

Session Records Total No. of sessions completed: 1

▼ Session 1 4/18/2021 ▲

Created by: Lisa Greer 4/18/2021 2:20:56 PM UTC

| Goals | Goal Status |
|---------------------------|-------------|
| 1. Use Mentoring Services | Not Set |

Session Notes

+ Add Session

Case Closing Summary

Contact Notes [add](#)

Figure 112

The case can still be found in the Participant's "Related Cases," with the most recently created case on top.

8.4. Manage Document Translation Cases

Search for the [case ID](#) of the case you need to manage or find it in the Participant's "[Related Cases](#)" tab when [viewing the Participant](#). Click the link to open the case.

Review the Follow-Up information, selecting "Completed" and creating another, if needed.

You can update additional information as needed. Click Done to save the case. If the case is ready to close, select "Completed" prior to clicking "Done."



| | | |
|------------------------------|---------------------------|---|
| Follow-Up Date 12/29/2020 | Follow-Up Reason gvzdr | Follow-Up Outcome Please Select <input type="checkbox"/> Completed |
|------------------------------|---------------------------|---|

Create Follow-Up

| | |
|---|---|
| Follow-Up Date <input type="text" value="15"/> | Follow-Up Reason <input type="text" value=""/> |
|---|---|

0 of 50 characters

[Follow-Up History](#) ▶

| | | |
|--|---------------------------|--------------------|
| Document Type* School Transcript or Report Card | From Language* English | No. of Pages* 2 |
| Other Document Type <input type="text" value=""/> | To Language* Russian | |

0 of 50 characters

| | | |
|---|---|-----------------------------|
| Document will be delivered via: Mail | Document will be returned via: Email | Date received 12/15/2020 |
| <input checked="" type="checkbox"/> Translated document was received by participant | | Date mailed 12/28/2020 |
| <input checked="" type="checkbox"/> Document no longer needs translation | | |

Who does the document belong to?*

What is the document owner's relationship to the participant?*

How will the translated document be used (e.g., legal purposes, school enrollment)?*

If the document is for immigration, who is sponsoring the owner of the document?*

Has the document ever been translated before? If so, is the participant able to provide a copy of the previous translation?*

Completed

Contact Notes [add](#)

Figure 113

The case can still be found in the Participant's "Related Cases," with the most recently created case on top.



8.5. Manage Consultation-Based Cases

Consultation-Based cases include:

- Health & Wellness
- Special Needs
- Peer Support
- Spouse Relocation
- Healthy Relationships
- New MilParent
- Transitioning Veteran

Search for the [case ID](#) of the case you need to manage or find it in the Participant’s [“Related Cases” tab](#) when [viewing the Participant](#). Click the link to open the case.

Review the information at the top of the screen and update if needed, including creating or updating the Follow-Up.

You will need to explain the Limits of Confidentiality if it has not already been done.

Note who the “Services are for” and if the Participant agrees to provide “Satisfaction Feedback.”

Limits of Confidentiality Explained

***Services are for:**

Self

Family Member

Relationship to Participant:

Gender:

Age:

***Satisfaction Feedback**

Agrees

Declines

Figure 114



Depending on the case type, you may track a "List of Conditions" or "Referral(s)." There will be notes fields for you to complete.

The screenshot displays a web form with the following sections:

- Correspondence:** A large text area with a character count of "0 of 32000 characters".
- Receiving other services?:** A text area with a character count of "0 of 500 characters".
- Describe services required:** A text area with a character count of "0 of 500 characters".
- Referral(s):** A section highlighted with a red border, containing a dropdown menu with "Please Select" and a downward arrow, an "Add Option" button, and a text input field with a character count of "0 of 50 characters".

Figure 115



To enter information related to a session, click "+Add Session."

List of Conditions

Please Select

0 of 50 characters

Specialty Consult Sessions Total No. of sessions completed: 0

Figure 116

If the Participant did not show up for the session, click "No Show." Most of the fields will disappear. Fill out remaining fields and click "Done" to save.

Specialty Consult: New MilParent Support Case ID: 985195 (Active)

Create New Session

Consultation Modality* Date of Service* No-Show

Final Session

[Cancel](#)

Figure 117



Otherwise, select support resources that were provided, enter notes and fill in any other fields.

Provided the Participant is expected to attend more sessions, you can click “Done” to save the session. If it will be the Participant’s final session, enter “Case Closing Summary” and select “Final Session” and fill in any additional fields that may appear. Click Done to save the session and close the case.

Session Notes

0 of 32000 characters

New MilParent Support Resources Provided By Counselor

| | |
|--|--|
| <input type="checkbox"/> Childcare | <input type="checkbox"/> Military OneSource Special Needs Specialty Consultation |
| <input type="checkbox"/> Early Intervention Services | <input type="checkbox"/> Military OneSource Website |
| <input type="checkbox"/> Federal, State, Local Community Services | <input type="checkbox"/> Military OneSource Work Life Specialty Consultation |
| <input type="checkbox"/> Lactation Specialist | <input type="checkbox"/> Other Insurance/Medicaid |
| <input type="checkbox"/> Military OneSource Building Healthy Relationship Specialty Consultation | <input type="checkbox"/> Provider referrals - Medical |
| <input type="checkbox"/> Military OneSource Health & Wellness Coaching | <input type="checkbox"/> Provider referrals -Mental health |
| <input type="checkbox"/> Military OneSource New MilParent Support Consultant | <input type="checkbox"/> State or federal programs |
| <input type="checkbox"/> Military OneSource Non-Medical Counseling | <input type="checkbox"/> Tricare |
| <input type="checkbox"/> Military OneSource Peer Support Specialty Consultation | |
| <input type="checkbox"/> Military OneSource SECO Services | |
| <input type="checkbox"/> Other | |

0 of 50 characters

Correspondence

0 of 32000 characters

Final Session

[Cancel](#) **Done**

Figure 118



You will see the details from any sessions that have been entered and can add another session, if needed.

The screenshot shows a web interface for "Specialty Consult Sessions". At the top right, it says "Total No. of sessions completed: 1". Below this is a dropdown menu for "Session 1" with a date of "4/16/2021". The session details are as follows:

| | |
|---|--------------------------|
| Created By: Lisa | 4/18/2021 3:02:54 PM UTC |
| Date of Service: 4/16/2021 | |
| Modality: Video | |
| No Show: No | |
| New MilParent Support Resources Provided By Counselor | |

At the bottom right of the session details area, there is a button labeled "+ Add Session".

Figure 119

The case can still be found in the Participant's "[Related Cases](#)," with the most recently created case on top.

8.6. Manage Work Life Cases With Sessions

The following Work Life cases allow Participants to attend sessions:

- Financial
- Tax

[Search for the case ID](#) of the case you need to manage or find it in the Participant's "[Related Cases](#)" tab when [viewing the Participant](#). Click the link to open the case.

Review the information at the top of the screen and update if needed.

Update the Counselor information, if needed. To enter session data, click "+Add Session."



If the Participant did not show up for the session, click “No Show.” Most of the fields will disappear. Fill out remaining fields and click “Done” to save.

Search

| | | | |
|------------------------------------|---------------------------------|--|---|
| First Name | Middle Name | Last Name | Participant ID |
| <input type="text" value="B"/> | <input type="text" value="MI"/> | <input type="text" value="Zee"/> | <input type="text" value="Participant ID"/> |
| Phone | DOB | Search Type | Case Number |
| <input type="text" value="Phone"/> | <input type="text"/> | <input type="text" value="Participant"/> | <input type="text" value="Case ID"/> |
| Primary Email | | | |
| <input type="text" value="Email"/> | | | |

Figure 121

Otherwise, enter the “Counseling Preference” and “Date of Service.” You also will be able to add and/or associate family members to participate in the counseling sessions.

Select the ‘Counseling Selections’ related to the session.

The Participant must leave the session with one to three goals, and the status of the goal(s) must be tracked.

Fill in all relevant information in the “Session Notes.”

Provided the Participant is expected to attend more sessions, you can click “Done” to save the session. If it will be the Participant’s final session, enter “Case Closing Summary” and select “Completed.” Click “Done” to save the session and close the case.



Financial Counseling Selections

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

Counseling Goals

1.* Please Select
0 of 50 characters

2. Please Select
0 of 50 characters

3. Please Select
0 of 50 characters

Session Notes

0 of 32000 characters

Final Session

[Cancel](#)

Figure 122



You will see the details from any sessions that have been entered and can add another session, if needed.

| Financial Sessions | Total No. of sessions completed: 1 |
|--|------------------------------------|
| ▼ Session 1 | 4/8/2021 |
| Created by: Lisa | 4/18/2021 3:15:00 PM UTC |
| Date of Service: 4/8/2021 | Modality: Video |
| No Show: No | |
| Referral Options Selected Budgeting | |
| Financial Goals | Goal Status |
| 1. ioliliylo | Met |
| Case Notes my session notes have been entered here. | |
| + Add Session | |

Figure 123

The case can still be found in the Participant's "[Related Cases](#)," with the most recently created case on top. Details of the session can be found on the manage view of the case when clicking the link to return to the case.

8.7. Manage Case Types Without Sessions

Case Types without sessions include:

- Wounded Warrior Resources
- Info and Referral
- Work Life
 - » Work Life
 - » Elder Care
 - » Education
 - » Adult Disability
 - » Adoption

[Search for the case ID](#) of the case you need to manage or find it in the Participant's "[Related Cases](#)" tab when [viewing the Participant](#). Click the link to open the case.

Review the information at the top of the screen and update if needed.



Create or Update the Follow-Up information, if needed.

You will need to show who the "Services are for" and answer questions about other services the Participant is receiving.

Multiple selections can be made for Referral(s) that were offered.

Create Follow-Up

Follow-Up Date Follow-Up Reason
0 of 50 characters

[Follow-Up History](#) ▾

***Services are for:**

Self

Family Member

***Relationship to Participant**

***Gender**

Age

Receiving other services?

51 of 500 characters

Describe services required

85 of 500 characters

Referral(s)

Educational Institution [Remove](#)

Military OneSource Health & Wellness Coaching [Remove](#)

0 of 50 characters

Figure 124



Click Done to save the case. If the case is ready to close, you will select "Completed" and enter the Closing Reason and summary prior to clicking "Done."

| Contact Notes | | add |
|---------------|--------------------------|---------------------|
| ▶ 1 Lis | 4/17/2021 3:07:39 PM UTC | |
| ▶ 2 Lis | 4/17/2021 2:53:54 PM UTC | |
| ▶ 3 Lis | 4/17/2021 2:53:20 PM UTC | |
| ▶ 4 Lis | 4/17/2021 2:52:22 PM UTC | |
| ▶ 5 Lis | 4/17/2021 2:49:45 PM UTC | |

Figure 125

The case can still be found in the Participant's "[Related Cases](#)," with the most recently created case on top.





8.8. Notes Feature

You can see all notes related to a Participant and their case(s) by selecting the “Notes” tab on the right of any screen pertaining to that Participant.

View Participant

Create Case
Edit

| | | | | |
|---|--------|--|--------|---|
| <u>Participant Name and Information</u> | | | | <u>Eligibility Info</u> Service Member? Yes Relation Guardian Pay Grade W-3 Branch of SVC Army National Guard Eligibility Status Active Duty Separation/Retirement Date  Wounded Warrior  Minor Participant Assigned Installation Not Previously Recorded |
| First | Middle | Last | Suffix | |
| Jo | Marie | Zee | | |
| DOB | Gender | Marital Status | | |
| 2/8/2006 | Female | Dual Military Career | | |
| <u>Current Address</u> | | | | |
| Address 123 Happy Street | | | | |
| Address (continued) Apt 2 | | | | |
| City | State | Postal Code | | |
| Awesomeville | PA | 12345 | | |
| Country United States | | | | |
| <u>Telephone</u> | | | | |
| Preferred Phone 2-222-222-2221 Confidential | | Work Phone 3-333-333-3333 Cell Phone 444-444-4444 Confidential | | |

CRISIS/DTW/MR
PROGRAM REFERRALS
RELATED CASES

NOTES

Figure 126



The Participant overview is shown on the left, and all case types that Participant has will be highlighted in the list in the main part of your screen.

DASHBOARD

PARTICIPANT OVERVIEW

Name
Jo Marie Zee

Participant ID
585069

Current Address
123 Happy Street
Apt 2
Awesomeville, PA 12345
United States

Preferred Phone
2-222-222-2221
Confidential

Work Phone
3-333-333-3333

Cell Phone
444-444-4444
Confidential

Email Address
BestEmailAddress@AwesomeEmails.com

Notes by Case Type

Current View: Notes by Case Type [Preview All Cases' Notes](#)

| | |
|--------------------------------|------------------------------------|
| Adoption | (0) notes |
| Adult Disability | (0) notes |
| Building Healthy Relationships | (0) notes |
| Bulk Fulfillment | (0) notes |
| Crisis | (0) notes |
| Document Translation | (0) notes |
| Education | View all (6) notes |
| Elder Care | View all (1) notes |
| Financial | (0) notes |
| Health and Wellness | (0) notes |
| Information and Referral | (0) notes |
| New MilParent Support | (0) notes |
| Non-Medical Counseling | View all (9) notes |
| Peer Support | View all (2) notes |

CRISIS /DTW/MR

PROGRAM REFERRALS

RELATED CASES

NOTES

Figure 127



For each case type, you can see the number of notes. Clicking the small triangle next to the Case Type will expand the container and show you a preview of up to five notes.

Notes by Case Type

| Current View: Notes by Case Type | | Preview All Cases' Notes |
|----------------------------------|------------------------------------|--|
| ▶ Adoption | (0) notes | |
| ▶ Adult Disability | (0) notes | |
| ▶ Building Healthy Relationships | (0) notes | |
| ▶ Bulk Fulfillment | (0) notes | |
| ▶ Crisis | (0) notes | |
| ▶ Document Translation | (0) notes | |
| ▶ Education | View all (6) notes | |
| ▶ Elder Care | View all (1) notes | |
| ▶ Financial | (0) notes | |
| ▶ Health and Wellness | (0) notes | |
| ▶ Information and Referral | (0) notes | |
| ▶ New MilParent Support | (0) notes | |
| ▶ Non-Medical Counseling | View all (9) notes | |
| ▶ Peer Support | View all (2) notes | |

CRISIS /DTW/MR

PROGRAM REFERRALS

RELATED CASES

NOTES

Figure 128



For longer notes you will see an ellipsis (...) at the end of the preview. You must click the “View all” link for that Case Type to read the entire note and to see additional notes that could exist.

Notes by Case Type

Current View: Notes by Case Type [Preview All Cases' Notes](#)

- ▶ Adoption (0) notes
- ▶ Adult Disability (0) notes
- ▶ Building Healthy Relationships (0) notes
- ▶ Bulk Fulfillment (0) notes
- ▶ Crisis (0) notes
- ▶ Document Translation (0) notes
- ▼ Education View all (7) notes

| Case # | Date | Time | Note Type |
|------------------------|-----------|-------------|--|
| 985189 | 4/17/2021 | 3:07 PM UTC | Contact Note |
| | | | Notes can be very long and are not always completely visible from the Notes section. When this happens only a... |
| 985189 | 4/17/2021 | 2:53 PM UTC | Contact Note |
| | | | Ms Smith called and said she would like to pursue a degree in Technology with a focus on data. |
| 985189 | 4/17/2021 | 2:53 PM UTC | Contact Note |
| | | | Ms Smith has narrowed her interests to Finance and Technology but is having difficulty selecting one. |
| 985189 | 4/17/2021 | 2:52 PM UTC | Contact Note |
| | | | Ms Smith's phone number has changed. |
| 985189 | 4/17/2021 | 2:49 PM UTC | Contact Note |
| | | | Ms Smith would like a call back next week. |

Figure 129



View Notes

Current View: All Education Notes [Return to Notes by Case Type](#)

| Case # | Date | Time | Case Type | Note Type |
|--|-----------|--------------|-----------|--------------|
| 985189 | 4/17/2021 | 3:07 PM UTC | Education | Contact Note |
| Notes can be very long and are not always completely visible from the Notes section. When this happens only a preview is shown. You must click the 'View all' link to read the entire note and to see additional notes that could exist. | | | | |
| 985189 | 4/17/2021 | 2:53 PM UTC | Education | Contact Note |
| Ms Smith called and said she would like to pursue a degree in Technology with a focus on data. | | | | |
| 985189 | 4/17/2021 | 2:53 PM UTC | Education | Contact Note |
| Ms Smith has narrowed her interests to Finance and Technology but is having difficulty selecting one. | | | | |
| 985189 | 4/17/2021 | 2:52 PM UTC | Education | Contact Note |
| Ms Smith's phone number has changed. | | | | |
| 985189 | 4/17/2021 | 2:49 PM UTC | Education | Contact Note |
| Ms Smith would like a call back next week. | | | | |
| 985189 | 4/17/2021 | 2:47 PM UTC | Education | Handoff |
| Ms Smith would like to work toward getting a degree. | | | | |
| 958327 | 9/19/2017 | 11:37 AM UTC | Education | Handoff |
| my handoff note | | | | |

Figure 130



If you would like to expand the notes containers for all the Participant's case types, select the "Preview All Cases' Notes" link in the top right of the screen.

Notes by Case Type

Current View: Notes by Case Type [Preview All Cases' Notes](#)

- ▶ Adoption (0) notes
- ▶ Adult Disability (0) notes
- ▶ Building Healthy Relationships (0) notes
- ▶ Bulk Fulfillment (0) notes
- ▶ Crisis (0) notes
- ▶ Document Translation (0) notes
- ▼ Education [View all \(7\) notes](#)

| Case # | Date | Time | Note Type |
|--|-----------|-------------|--------------|
| 985189 | 4/17/2021 | 3:07 PM UTC | Contact Note |
| Notes can be very long and are not always completely visible from the Notes section. When this happens only a... | | | |
| 985189 | 4/17/2021 | 2:53 PM UTC | Contact Note |
| Ms Smith called and said she would like to pursue a degree in Technology with a focus on data. | | | |
| 985189 | 4/17/2021 | 2:53 PM UTC | Contact Note |
| Ms Smith has narrowed her interests to Finance and Technology but is having difficulty selecting one. | | | |
| 985189 | 4/17/2021 | 2:52 PM UTC | Contact Note |
| Ms Smith's phone number has changed. | | | |
| 985189 | 4/17/2021 | 2:49 PM UTC | Contact Note |
| Ms Smith would like a call back next week. | | | |

Figure 131



You can collapse all containers again by choosing to hide them.

Notes by Case Type

| Current View: Notes by Case Type | Hide All Cases' Notes |
|--|---------------------------------------|
| ▶ Adoption (0) notes | |
| ▶ Adult Disability (0) notes | |
| ▶ Building Healthy Relationships (0) notes | |
| ▶ Bulk Fulfillment (0) notes | |
| ▶ Crisis (0) notes | |
| ▶ Document Translation (0) notes | |
| ▼ Education View all (7) notes | |

| Case # | Date | Time | Note Type |
|--|-----------|-------------|--------------|
| 985189 | 4/17/2021 | 3:07 PM UTC | Contact Note |
| Notes can be very long and are not always completely visible from the Notes section. When this happens only a... | | | |
| 985189 | 4/17/2021 | 2:53 PM UTC | Contact Note |
| Ms Smith called and said she would like to pursue a degree in Technology with a focus on data. | | | |
| 985189 | 4/17/2021 | 2:53 PM UTC | Contact Note |
| Ms Smith has narrowed her interests to Finance and Technology but is having difficulty selecting one. | | | |
| 985189 | 4/17/2021 | 2:52 PM UTC | Contact Note |
| Ms Smith's phone number has changed. | | | |
| 985189 | 4/17/2021 | 2:49 PM UTC | Contact Note |
| Ms Smith would like a call back next week. | | | |

| ▼ Elder Care View all (1) notes | | | | | | | | | | | | |
|--|-----------|--------------|-----------|-----------|------------------------|-----------|--------------|---------|-------------------|--|--|--|
| <table border="1"> <thead> <tr> <th>Case #</th> <th>Date</th> <th>Time</th> <th>Note Type</th> </tr> </thead> <tbody> <tr> <td>958326</td> <td>9/19/2017</td> <td>11:36 AM UTC</td> <td>Handoff</td> </tr> <tr> <td colspan="4">handoff note here</td> </tr> </tbody> </table> | Case # | Date | Time | Note Type | 958326 | 9/19/2017 | 11:36 AM UTC | Handoff | handoff note here | | | |
| Case # | Date | Time | Note Type | | | | | | | | | |
| 958326 | 9/19/2017 | 11:36 AM UTC | Handoff | | | | | | | | | |
| handoff note here | | | | | | | | | | | | |



9. Other Incoming Calls

9.1. Quick Tracker

When a call is received and the caller only needs information to contact other agencies or groups, it is noted in the Quick Tracker, which can be accessed at the right of the Search screen.

The screenshot shows a search interface with the following fields and controls:

- Search** (Section Header)
- First Name**: Input field with placeholder "First Name" and a dropdown arrow.
- Middle Name**: Input field with placeholder "MI".
- Last Name**: Input field with placeholder "Last Name".
- Participant ID**: Input field with placeholder "Participant ID".
- Phone**: Input field with placeholder "Phone".
- DOB**: Input field.
- Search Type**: Dropdown menu with "Participant" selected.
- Case Number**: Input field with placeholder "Case ID".
- Primary Email**: Input field with placeholder "Email".
- Search** and **Clear** buttons.
- Table Header**:

| Name | Address | Phone | DOB |
|------|---------|-------|-----|
|------|---------|-------|-----|

On the right side of the interface, there are two vertical tabs: "CRISIS /DTW/MR" (top) and "QUICK TRACKER" (bottom, highlighted with a red border).

Figure 132



Simply select the options related to the call and click "Done" to save.

Search

| First Name First Name | Middle Name MI | Last Name Last Name | Participant ID Participant ID |
|--|--|----------------------------|----------------------------------|
| Phone Phone | DOB | Search Type Participant | Case Number Case ID |
| Primary Email Email | QUICK TRACKER <ul style="list-style-type: none"><input type="checkbox"/> American Red Cross<input checked="" type="checkbox"/> Base Resources<input type="checkbox"/> BeThere<input type="checkbox"/> CG Support<input type="checkbox"/> Community Resources<input type="checkbox"/> DFAS<input type="checkbox"/> DSN Number<input checked="" type="checkbox"/> Financial Assistance<input type="checkbox"/> GI/VA Loan Information<input type="checkbox"/> Government Program<input type="checkbox"/> Housing<input type="checkbox"/> JAG Phone Number<input type="checkbox"/> Legal | | |
| <table border="1"><thead><tr><th>Name</th><th>Address</th></tr></thead><tbody></tbody></table> | | | |
| Name | Address | | |

Done

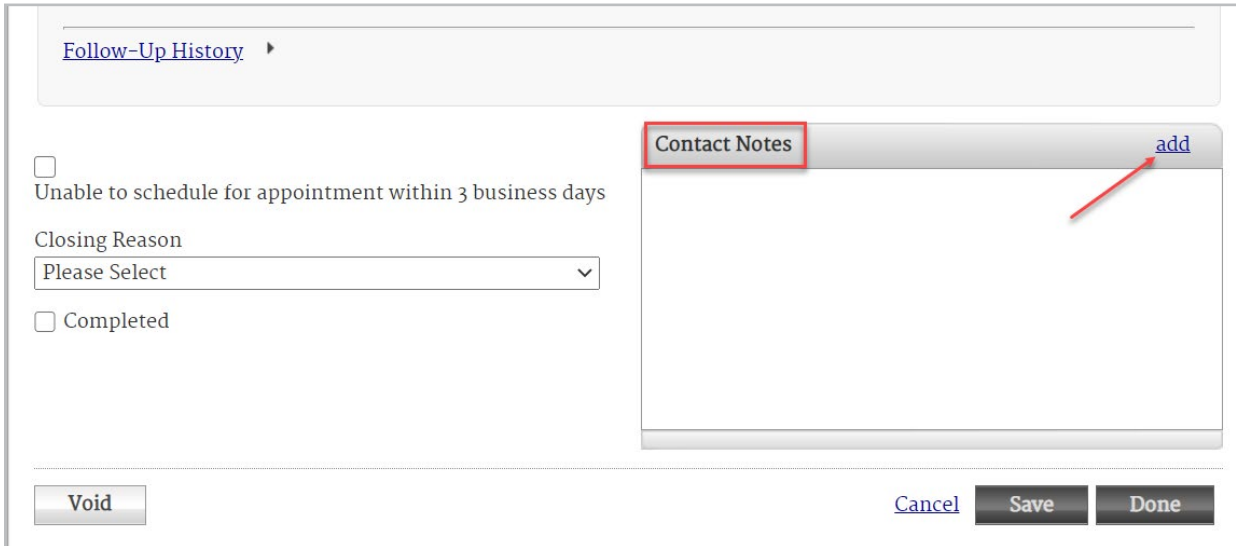
Figure 133

9.2. Contact Notes

At times, a Participant will call in to provide additional information for their case. Access the case by selecting it from your dashboard, from the ["Related Cases" tab](#) in the right panel when [viewing a Participant's record](#), or by [searching for it by "Case Number."](#) Contact Notes can be entered even if a case is closed.



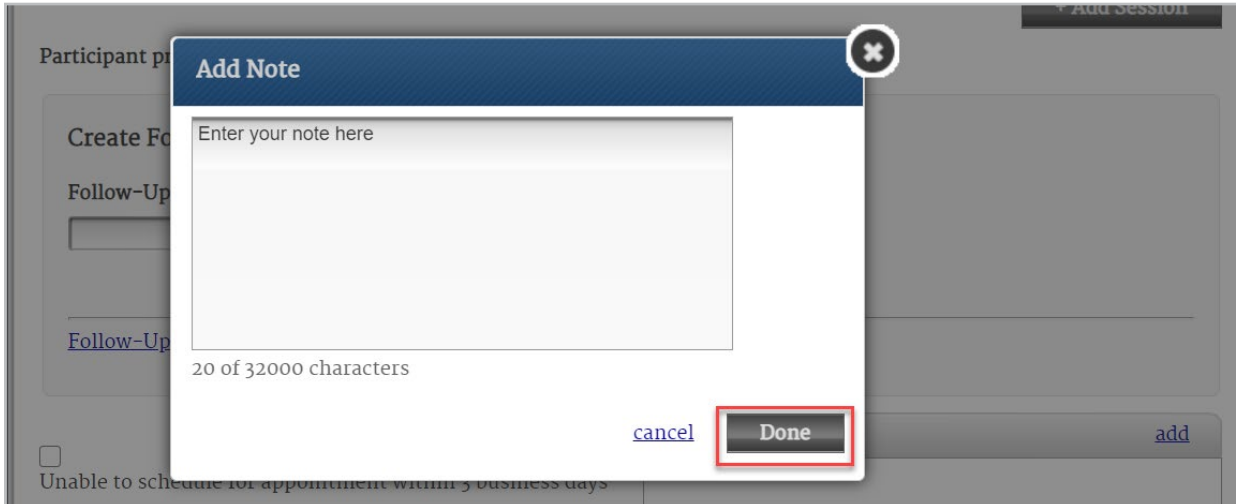
Scroll to the bottom of the screen to see the “Contact Notes” field. Select “Add” to open the “Add Note” modal with a text-entry field.



The screenshot shows a web interface with a 'Follow-Up History' dropdown menu. Below it are several form elements: an unchecked checkbox for 'Unable to schedule for appointment within 3 business days', a 'Closing Reason' dropdown menu with 'Please Select' as the current selection, and another unchecked checkbox for 'Completed'. To the right of these elements is a 'Contact Notes' text area. A red box highlights the 'Contact Notes' header, and a red arrow points to an 'add' link in the top right corner of the text area. At the bottom of the interface are buttons for 'Void', 'Cancel', 'Save', and 'Done'.

Figure 134

When finished entering your note, select “Done.”



The screenshot shows a modal dialog box titled 'Add Note' with a close button (X) in the top right corner. Inside the modal is a text input field with the placeholder text 'Enter your note here'. Below the input field is a character count: '20 of 32000 characters'. At the bottom of the modal are two buttons: 'cancel' and 'Done'. The 'Done' button is highlighted with a red box. The background shows a blurred view of the main interface with the 'add' link visible.

Figure 135



Saved notes can be viewed in the "Contact Notes" container.

Unable to schedule for appointment within 3 business days
 Closing Reason
 Please Select
 Completed

Contact Notes [add](#)

- 1 Lisa Greer 4/17/2021 3:43:07 PM UTC
Here is the note I entered.
- 2 Lisa Greer 4/17/2021 3:42:49 PM UTC

Figure 136

9.3. Administrative Notes

When a caller needs information added to their Participant file, you can use the "Administrative Notes" field. [Search for the Participant record](#) and click the link to open it.

In the right portion of the screen, you will see the "Administrative Notes" field.

Confidential
 Cell Phone
 234-345-9835
 Confidential

Assigned Installation
Fort Bliss

Email

Email Address
MyBestEmail@mail.com

Additional Information

Requires Interpreter
No

Receive Outreach Communications
Not Applicable - Minor Participant

How did the contact participant hear about the program?

Administrative Notes

- 1 Lisa Greer 4/10/2021 10:16:45 PM UTC
- 2 Lisa Greer 4/10/2021 10:13:32 PM UTC

Figure 137



To add a new "Administrative Note" you must first click the Participant "Edit" button at the top of the page. Then select "Add" to open the "Add Note" modal with a text-entry field.

Other Source

Time Zone
Please Select ▼

Do Not Use - Duplicate record

Created By
Lisa NONseco 00 - 9/28/2015 1:54:12 PM

Last Modified By

Lisa Greer - 4/10/2021 10:16:45 PM

Last Accessed
Lisa Greer - 4/17/2021 3:44:48 PM

Administrative Notes Need Review

| Administrative Notes |
|--|
| ▶ 1 Lisa Greer 4/10/2021 10:16:45 PM UTC |
| ▶ 2 Lisa Greer 4/10/2021 10:13:32 PM UTC |

[add](#)

Figure 138

When finished entering your Administrative Note, select "Done" to save the note and close the modal.

Time Zone
Please Select

Do Not Use

Created By
Lisa NONseco

Last Modified
Lisa Greer - 4

Last Accessed
Lisa Greer - 4

Parent/Guar
No Parent/Guardian info available

Administrative Notes Need Review

Add Note ✕

I have entered my administrative note here

42 of 32000 characters

[cancel](#) **Done**

| Notes |
|-----------------------------|
| /17/2021 3:51:01 PM UTC |
| ny administrative note here |
| /17/2021 3:50:36 PM UTC |
| /10/2021 10:16:45 PM UTC |
| /10/2021 10:13:32 PM UTC |

Total No. of Parent/Guardians: 0

Figure 139



To alert others that they should read the Administrative Notes when viewing the Participant record, select the checkbox for “Administrative Notes Need Review.”

| | |
|--|--|
| Other Source <input type="text"/> | <input checked="" type="checkbox"/> Administrative Notes Need Review |
| Time Zone Please Select ▼ | Administrative Notes add |
| <input type="checkbox"/> Do Not Use - Duplicate record | ▶ 1 Lisa [redacted] 4/17/2021 3:51:01 PM UTC |
| Created By | ▶ 2 Lisa [redacted] 4/17/2021 3:50:36 PM UTC |

Figure 140

Click “Done” on the Participant screen to save your edits. Saved notes can be viewed in the “Administrative Notes” container. The flag for will be easily noticed on the Participant View screen.

| | |
|---|--|
| Confidential | |
| Email | <input type="text"/> |
| Email Address MyBestEmail@mail.com | <input checked="" type="checkbox"/> Administrative Notes Need Review |
| Additional Information | ▶ 1 Lisa [redacted] 4/17/2021 3:51:01 PM UTC |
| Requires Interpreter No | ▶ 2 Lisa [redacted] 4/17/2021 3:50:36 PM UTC |
| Receive Outreach Communications Not Applicable - Minor Participant | ▶ 3 Lisa [redacted] 4/10/2021 10:16:45 PM UTC |
| How did the contact participant hear about the program? | ▶ 4 Lisa [redacted] 4/10/2021 10:13:32 PM UTC |

Figure 141



10. Reports

10.1. Overview

If you have permissions to view one or more report, you can access the Reports Index page from anywhere in the system by clicking on it in the menu at the top of the screen. Each report is accessed by the link in its name. If you also have access to the Data Warehouse, its link will take you out of the eCMS and to the Data Warehouse to log in.

Reports

Your permissions allow you to run the following reports.

[Data Warehouse](#)

[Crisis - DTW - MR Details Report](#)

[Crisis - DTW - MR Internal Summary Report](#)

[Case Demographics Report](#)

[NMCO Stale Cases Report](#)

[Program Study Consent Report](#)

[SECO Case Activity Report](#)

[SECO Case Demographics Report](#)

[SECO Closed Case Activity Report](#)

[SECO Inactive Case Report](#)

[SECO Participant Demographics Report](#)

[SECO Unassigned Case Report](#)

[Session Demographics Report](#)

[Quick Call Categories](#)

[Outreach Support Report for Separating and or Retiring Service Members](#)

[Tax Outreach Support Report](#)

[Transition Assistance Program Data Report](#)

[Transition Assistance Program Peer Support Warm Handover](#)

Figure 142



10.2. List Reports

For List Reports, you will provide a date range and/or other filter criteria. When you click “View Report” it will render a list of records matching your criteria.

The following are List Reports:

- Crisis -DTW-MR Details Report
- NMCO Stale Cases Report
- Program Study Consent Report
- SECO Case Activity Report
- SECO Closed Case Activity Report
- SECO Inactive Case Report
- SECO Unassigned Case Report
- Outreach Support Report for Separating and or Retiring Service Members
- Tax Outreach Support Report
- Transition Assistance Program Data Report
- Transition Assistance Program Data Warm Handover
- Transition Assistance Program Peer Support Warm Handover

10.3. Summary Reports

You also will provide filter criteria for Summary Reports. However, when you click “View Report” it will render a simple aggregate summary of the number of records matching your criteria.

The following are Summary Reports:

- Crisis - DTW-MR Internal Summary Report
- Quick Call Categories

10.4. Dimensional Aggregate Reports

For Dimensional Aggregate Reports you will again provide filter criteria. In addition, you must select dimensions for aggregates (total numbers of records) across X and Y dimensions. The numbers in each cell of the result represent the total number of records that meet the criteria on each dimension. For example, if Gender is selected for the X Axis and Marital Status is selected for the Y Axis, then the report will provide totals for Single Men, Married Men, Divorced Men, Single Women, Married Women, Divorced Women, etc.

The following are Dimensional Aggregate Reports:

- Case Demographics Report
- SECO Case Demographics Report
- SECO Participant Demographics Report
- Session Demographics Reports



11. Admin

11.1. Overview

The eCMS has an Administration page which takes an Admin to the following management areas:

- User Manager
- List Management
- File Manager
- Case Studies
- Case Management References
- Feedback Management
- Role Manager

11.2. User Manager

11.2.1. OVERVIEW

As an Admin, one of your duties could be managing user accounts. This will explain how to [invite a new user](#) to the eCMS, [send a cert Change Request](#) for an existing user to replace their associated CAC/ECA certificate, and [disable/enable accounts](#).

11.2.2. INVITE A NEW USER TO REGISTER.

Warning: Remember, the eCMS is open only to people who have been approved by the government through preexisting processes. Ensure a person is approved prior to inviting them to register. Approval will also instruct you as to which role(s) to assign to the user.



To invite a new user, click the Admin link in the main navigation bar, then the link for User Manager which is on the left of the next screen.

The screenshot shows the 'Case Management System' interface. At the top, there is a navigation bar with links for SEARCH, MY DASHBOARD, REPORTS, PROFILE, ADMIN, and LOGOUT. The 'ADMIN' link is highlighted with a red arrow. Below the navigation bar, the page is titled 'Administration'. On the left side, there are three main sections: 'User Management', 'List Management', and 'Research Study Management'. Under 'User Management', the 'User Manager' link is highlighted with a red box. Under 'List Management', there are links for 'List Management' and 'File Manager'. Under 'Research Study Management', there is a link for 'Case Studies'. On the right side, there are three sections: 'References & Training' with a link for 'Case Management References', 'Technical Support Feedback' with a link for 'Feedback Management', and 'Role Management' with a link for 'Role Manager'. A vertical red bar on the far right contains the text 'CRISIS /DTW/MR'.

Figure 143



You need to first verify the user does not already have an account by performing a search for them. The email address should be unique, so it is a critical field for your search. After entering data into at least one field, select "Submit" to see the results.

User Manager

Invite User

Role

Please Select

Hide/Show Deleted Accounts

Default - Hide Deleted Accounts

Search

Clear

| Name | Email | Invite Status | Account Status |
|---------|--------------|---------------|----------------|
| Janet | janet. .com | Registered | Approved |
| Janelle | Janelle .com | Registered | Locked |
| Janette | Janette .com | Registered | Approved |

Users 1 - 3 of 3 Page 1 of 1 [Go](#) [Previous](#) | [Next](#)

Figure 144

If you find the user you are looking for, check their account status to determine next steps.

| INVITE STATUS | ACCOUNT STATUS | MEANING | ACTION |
|---------------|----------------|------------------------------|---|
| Pending | Pending | Invite sent and active | Have user check email spam/junk folders for invite |
| Expired | Pending | Invite sent and active | Send new invite |
| Canceled | Pending | Invite sent and canceled | Verify user still authorized access, send new invite |
| Registered | Disabled | Active user who was disabled | Verify user authorized access, enable account |
| Registered | Locked | Old status not in use | No longer relevant |
| Registered | Approved | User has access | Ask user if they now have a new cert, send Change Request |



If you do not find the user, you will need to send an invitation for them to register by clicking the “Invite User” button.

User Manager

Invite User

| | |
|--|--|
| Name | Email |
| <input type="text" value="Jane"/> | <input type="text"/> |
| Role | Hide/Show Deleted Accounts |
| <input type="text" value="Please Select"/> | <input type="text" value="Default - Hide Deleted Accounts"/> |

| Name | Email | Invite Status | Account Status |
|---------|--------------|---------------|----------------|
| Janet | janet. .com | Registered | Approved |
| Janelle | Janelle .com | Registered | Locked |
| Janette | Janette .com | Registered | Approved |

Users 1 - 3 of 3 Page of 1 [Go](#) Previous | Next

Figure 145



You simply enter the name and email info and select the appropriate role(s) the user should have based on instruction from the government. Complete the process by selecting the “Invite” button, which saves the information and sends an email for the user to [register their user account](#).

Invite User indicates a required field

Enter the information for the staff member you would like to invite to the system.

| | | |
|----------------------------------|------------------------------------|---|
| First Name * | Last Name * | Email Address * |
| <input type="text" value="Jim"/> | <input type="text" value="Smith"/> | <input type="text" value="jim.smith@bestmail.com"/> |

Roles *

- Admin
- Call Center Supervisor
- OSD Program Staff
- Clinical Network Manager
- Specialty Consultant Supervisor
- Specialty Consultant
- Vendor Program Manager
- Triage Consultant
- Quality Assurance and Auditors Vendor
- Network Manager
- SECO Advisor
- SECO Specialty Consultant
- SECO Specialty Consultant Supervisor
- User Manager Administrator
- RAND Research Staff
- OSD Program Staff Reporting
- AAR Webservice
- Developer
- SECO Triage Consultant
- Service Liaison
- Secure Reporting

[Cancel](#)

Figure 146



11.2.3. RESEND INVITATION

If the user did not receive the invitation or it has expired, return to their profile, scroll down and select "Send New Invite." You also can cancel an invitation, if needed.



Figure 147

11.2.4. EDITING A USER ACCOUNT

To get to User Manager, click the Admin link in the main navigation bar, then the link for User Manager which is on the left of the next screen.

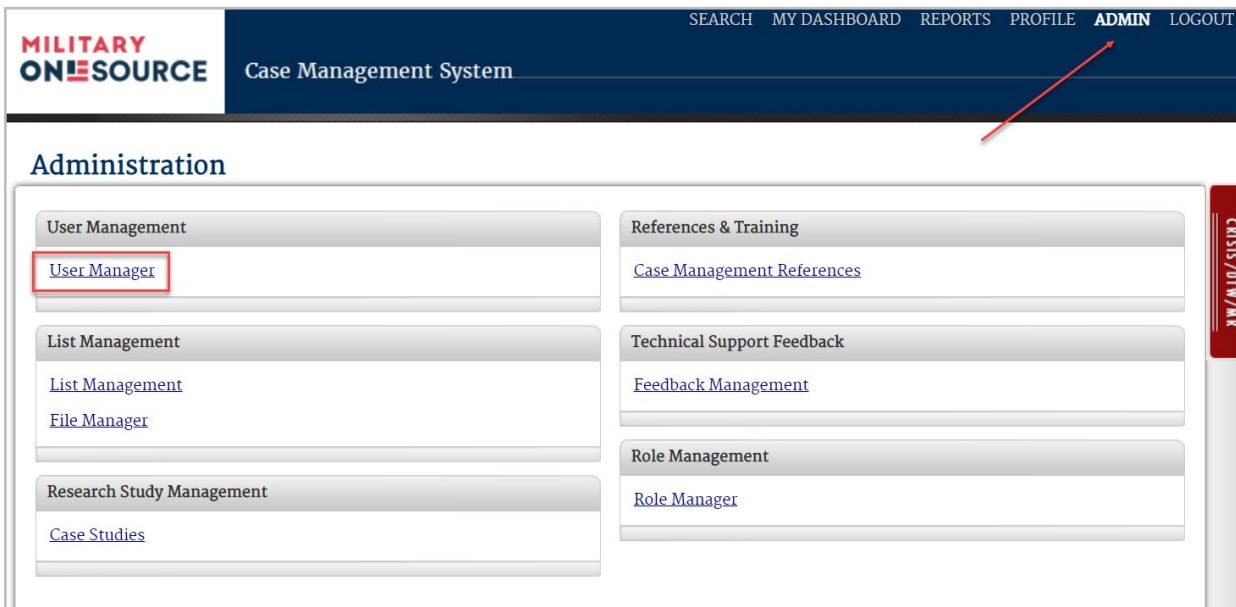


Figure 148

You can search for the user by name and/or email address, clicking "Submit" to see the results.

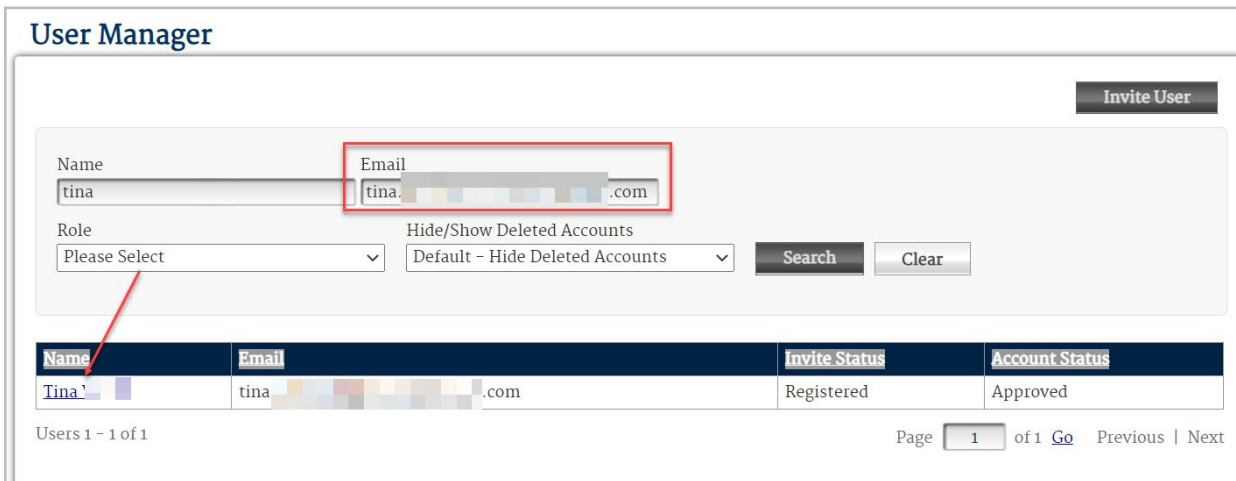
Locate the user and click their name to view their profile. Now you simply click "Edit," make your changes and click "Submit."



11.2.5. HOW TO ASSIST USER WITH REPLACING THEIR CAC/ECA CERTIFICATE.

You will need to assist users if their cert has changed. To get to User Manager, click the Admin link in the main navigation bar, then the link for User Manager which is on the left of the next screen.

You need to first verify the user does not already have an account by performing a search for them. The email address should be unique, so it is a critical field to search for. After entering data into at least one field, select "Submit" to see the results. Locate the user whose CAC/ECA certificate needs to be updated and click their name to view their profile.



User Manager

[Invite User](#)

Name: Email:

Role: Hide/Show Deleted Accounts:

| Name | Email | Invite Status | Account Status |
|------|------------|---------------|----------------|
| Tina | tina. .com | Registered | Approved |

Users 1 - 1 of 1 Page 1 of 1 [Go](#) [Previous](#) | [Next](#)

Figure 149



Scroll down to the CAC/ECA change request section and simply click “Send Change Request.” The system will send an invitation to the user via email so they can [complete the request to replace CAC/ECA certificate.](#)

View Profile Back Edit

First Name Tina
Last Name [Redacted]
Email tina.v [Redacted]@ [Redacted].com

Roles

Specialty Consultant Supervisor

Login Information

Last Login Date 09-10-2014 00:51:03 UTC
Last Login IP 65.246.88.3
Last Failed Login Date 07-30-2014 17:52:04 UTC
Last Failed Login IP 65.246.88.3

CAC/ECA Change Request

This is for NEW CERTS only. No action is needed for cert renewals.

Figure 150



11.2.6. HOW TO DISABLE A USER

At times you will need to disable a user. Click the Admin link in the main navigation bar, then the link for User Manager which is on the left of the next screen.

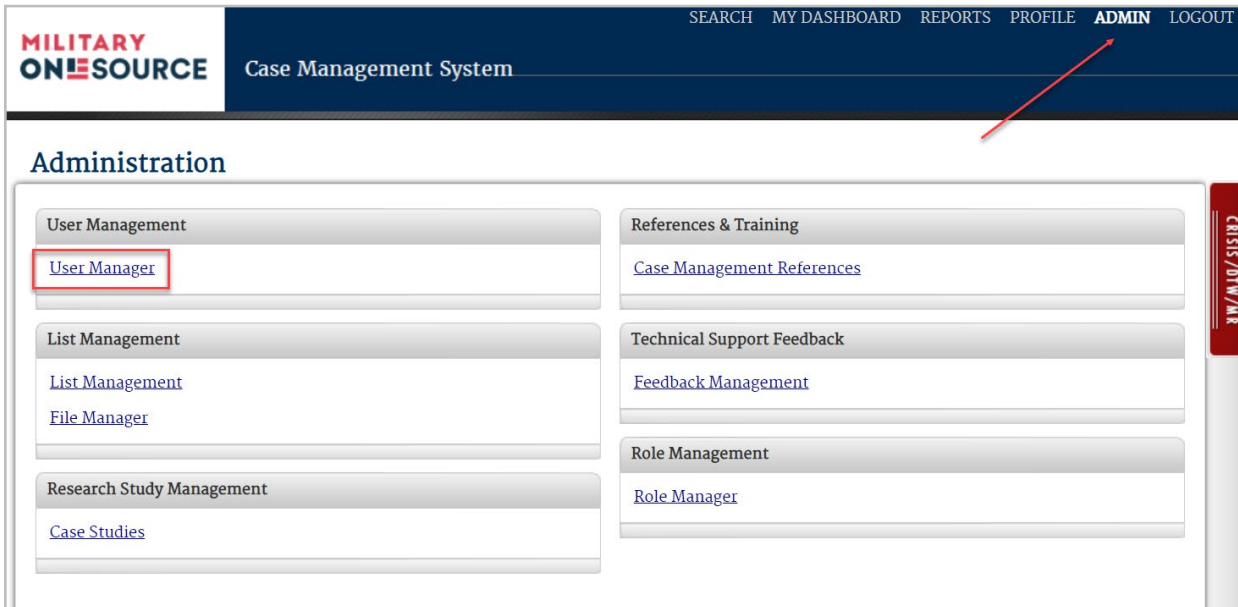


Figure 151

You can search for the user by name and/or email address, clicking "Submit" to see the results. Locate the user and click their name to view their profile.

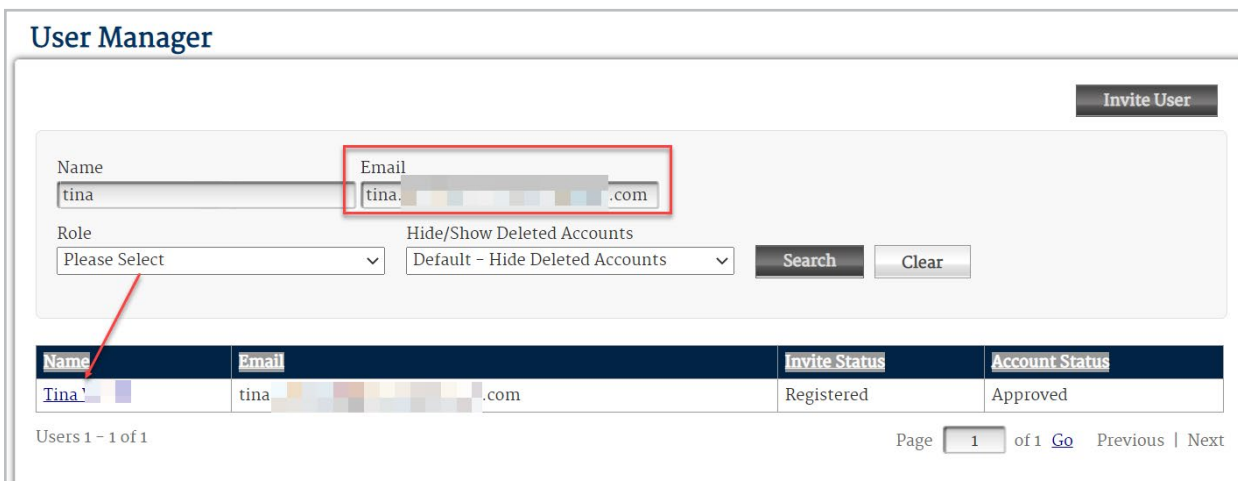


Figure 152



Open the “Edit” view.

View Profile Back Edit

First Name Tina
Last Name [redacted]
Email tina.[redacted].com

Roles
Specialty Consultant Supervisor

Figure 153

You will see a checkbox to the right of their profile information labeled “Approved.” The checkbox must be selected if you want the user to be Enabled and allowed entry into the application. It must be empty if you want the user to be Disabled and refused entry into the application. Mark the field for the desired outcome and “Save” your changes.

Update * = required

First Name * Tina Last Name * [redacted] Email * tina.[redacted] Approved

Roles *

Figure 154

11.3. List Management

11.3.1. OVERVIEW

There are three main types of lists in the eCMS: fully manageable lists, partially managed lists and lists restricted from List Management. This will explain how to perform the actions in List Management. Some lists will have all the explained functionality, while others will have only some features. If a list you want to manage cannot be found in the list, it is likely restricted from List Management and the development team will need to be involved with updating the list. Altering items in List Management directly affects how those lists are seen in the application. It may take a delay of 10 minutes before updates are seen in the system.



11.3.2. MANAGING LISTS

List Management is found in the Admin screen.

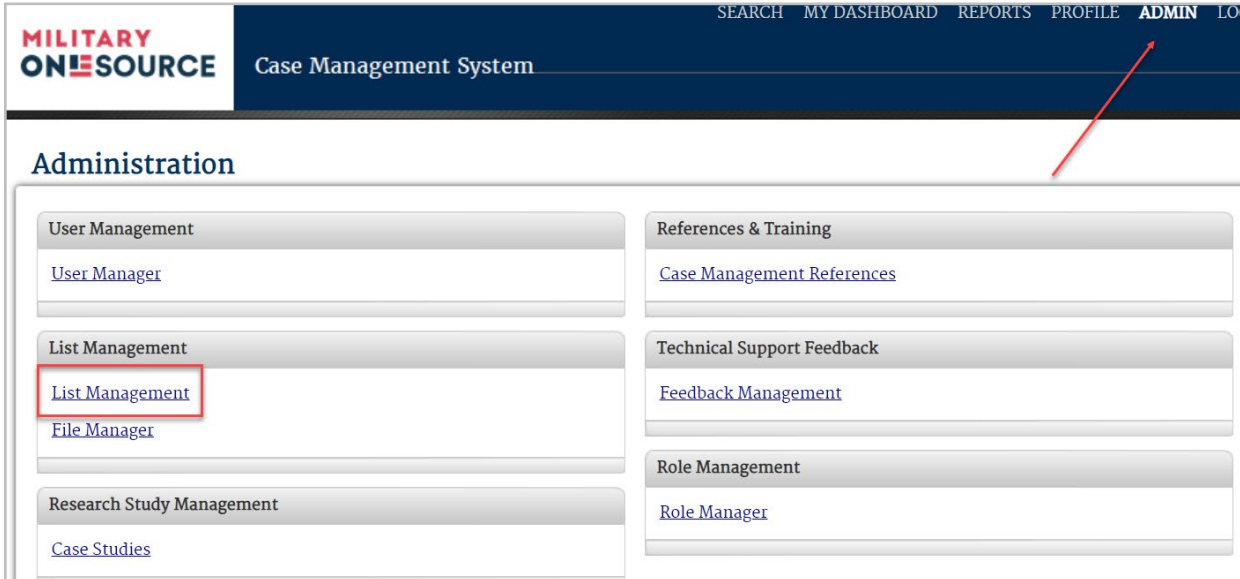


Figure 155

The “List Management” main page shows all lists that you can manage. When you click on a list name, it takes you to a page to manage that list.

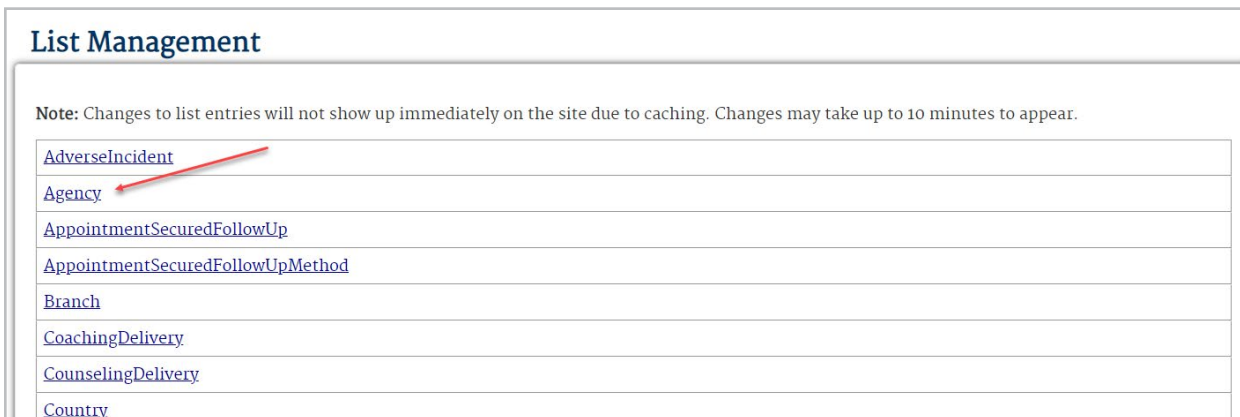
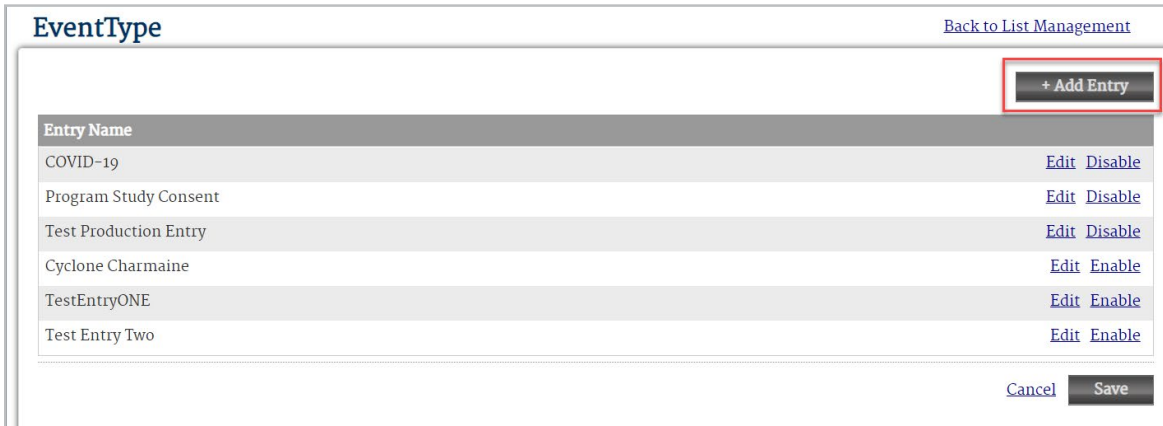


Figure 156



Select the “+Add Entry” button at the top of the page to create another option to show in the list.



Event Type [Back to List Management](#)

+ Add Entry

| Entry Name | |
|-----------------------|--|
| COVID-19 | Edit Disable |
| Program Study Consent | Edit Disable |
| Test Production Entry | Edit Disable |
| Cyclone Charmaine | Edit Enable |
| TestEntryONE | Edit Enable |
| Test Entry Two | Edit Enable |

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

Figure 157

You just type in the “Entry Name” and click “Save.”



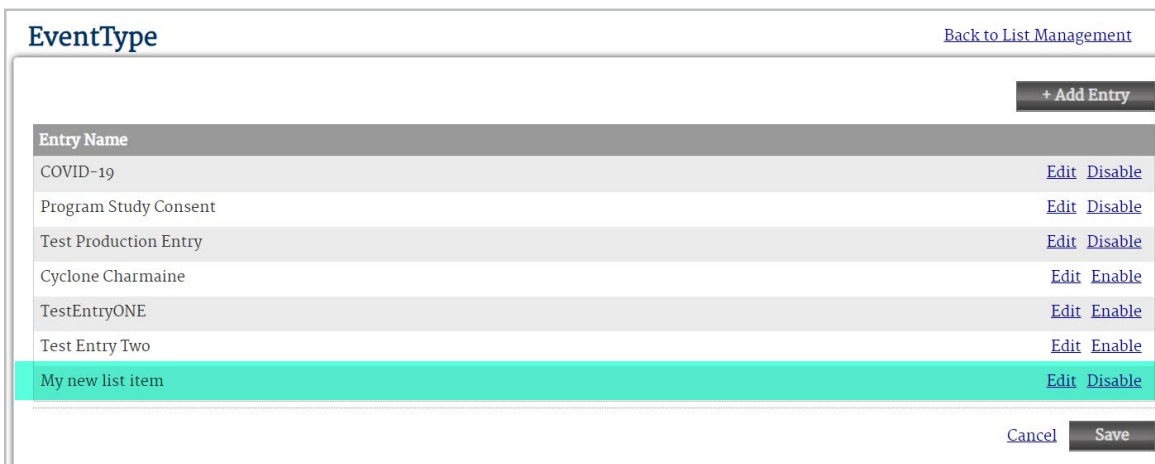
Add/Edit List Entry

Entry Name
My new list item

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

Figure 158

The new entry appears in the list and is enabled.



Event Type [Back to List Management](#)

+ Add Entry

| Entry Name | |
|-----------------------|--|
| COVID-19 | Edit Disable |
| Program Study Consent | Edit Disable |
| Test Production Entry | Edit Disable |
| Cyclone Charmaine | Edit Enable |
| TestEntryONE | Edit Enable |
| Test Entry Two | Edit Enable |
| My new list item | Edit Disable |

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

Figure 159



You can click "Disable" to hide a list item from showing in the eCMS, click "Enable" to make it show, and click-and-drag rows in list management to reorder the way the items will be shown throughout the system. Selecting "Edit" allows you to edit the entry name.

11.4. File Manager

File Manager is found in the Admin screen.



Figure 160

The first view you see in File Manager is the Download Center, where you see a list of all files currently uploaded to eCMS. You can download any file by clicking the link on the file name or choose to "Add File."

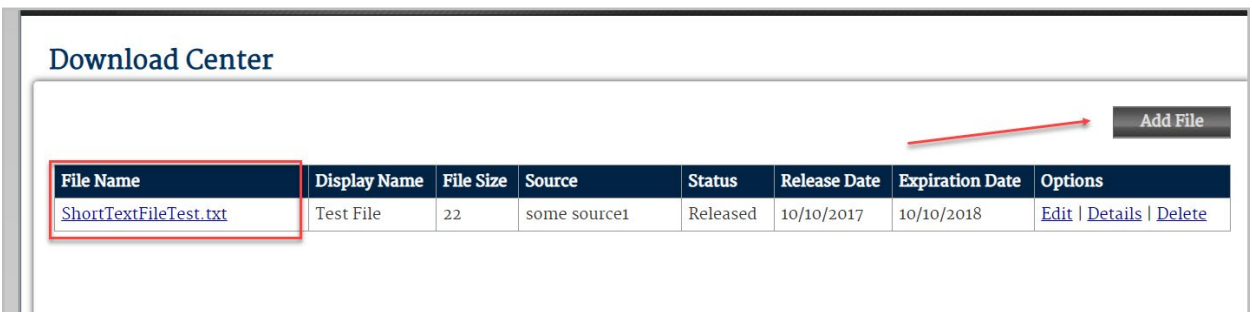


Figure 161



Selecting “Choose File” will open a box where you can browse your files and select the one you want to upload.

The screenshot shows the 'Add File' form with the following fields:

- Upload File:** A button labeled 'Choose File' is highlighted with a red box. To its right, the text 'No file chosen' is displayed.
- Display Name:** An empty text input field with a calendar icon on the right.
- File Description:** An empty text input field.
- File Status:** A dropdown menu with 'Please Select' and a downward arrow.
- Source:** An empty text input field.
- Release Date:** A date input field with a calendar icon.
- Expiration Date:** A date input field with a calendar icon.

At the bottom right of the form, there are two buttons: 'Cancel' (a blue link) and 'Save' (a dark grey button).

Figure 162

Once you have selected the correct file, you can fill in the details of the form and “Save” your changes.

The screenshot shows the 'Add File' form with the following fields filled out:

- Upload File:** A button labeled 'Choose File' is highlighted with a red box. To its right, the text 'My Test File.docx' is displayed.
- Display Name:** The text 'My Text File' is entered in the input field.
- File Description:** The text 'Test data in a Word document' is entered in the input field.
- File Status:** The dropdown menu is set to 'Approved But Not Released'.
- Source:** The text 'My computer files' is entered in the input field.
- Release Date:** The date '04/19/2021' is entered in the input field.
- Expiration Date:** The date '03/16/2022' is entered in the input field.

A red arrow points to the 'Save' button at the bottom right of the form.

Figure 163



To allow others to access your uploaded file, click "Edit" and select the Roles which should have permission to view your file.

Update File

File Name My Test File.docx

Display Name **File Description**

File Status **Source** **Release Date** **Expiration Date**

Roles

- Admin
- Call Center Supervisor
- OSD Program Staff
- Clinical Network Manager
- Specialty Consultant Supervisor
- Specialty Consultant
- Vendor Program Manager
- Triage Consultant
- Quality Assurance and Auditors Vendor
- Network Manager
- SECO Advisor
- SECO Specialty Consultant
- SECO Specialty Consultant Supervisor
- User Manager Administrator
- RAND Research Staff
- OSD Program Staff Reporting
- AAR Webservice
- QA Supervisor
- Developer
- Service Liaison
- service
- TAP Data and Reporting

[Cancel](#)

Figure 164



11.5. Case Studies

From the Admin Case Study link you can see a list of all existing Case Studies. Clicking the link on the name of a study will allow you to edit it.

Case Study List

| Case Study | Case Type | Start Date | End Date |
|---------------------------|------------------------|------------|-----------|
| Military | Crisis | 5/4/2015 | 7/4/2015 |
| Military | Financial Counseling | 5/4/2015 | 7/4/2015 |
| Prod Test | Non-Medical Counseling | 2/4/2014 | 2/1/2015 |
| RAND | Non-Medical Counseling | 9/1/2016 | 9/30/2016 |

[+ Add Case Study](#)

Figure 165

You can select “+Add Case Study” to create a new Case study. You must supply a “Research Study Name,” the “Case Type” where you would like the study to show and a timeframe in which it should show. You also have the option to “Exclude Participants Under the Age of 18,” if desired. Click “Save” when you are finished.

Add/Edit Case Study

*Research Study Name

*Case Type
Please Select ▼

Start Date* 15 End Date* 15

Exclude Participants Under the Age of 18

[Cancel](#)

Figure 166



11.6. References and Training

11.6.1. OVERVIEW

The References and Training section of the admin page contains a link to a “Case Management References” page with various documents and videos that can be used for training purposes and to understand the Case Management System.

11.7. Technical Support Feedback

11.7.1. OVERVIEW

The “Technical Support Feedback” section of the Admin page contains a “Feedback Management” link where you can create a support ticket if you encounter issues in the eCMS. A link can also be found in the footer of all pages.

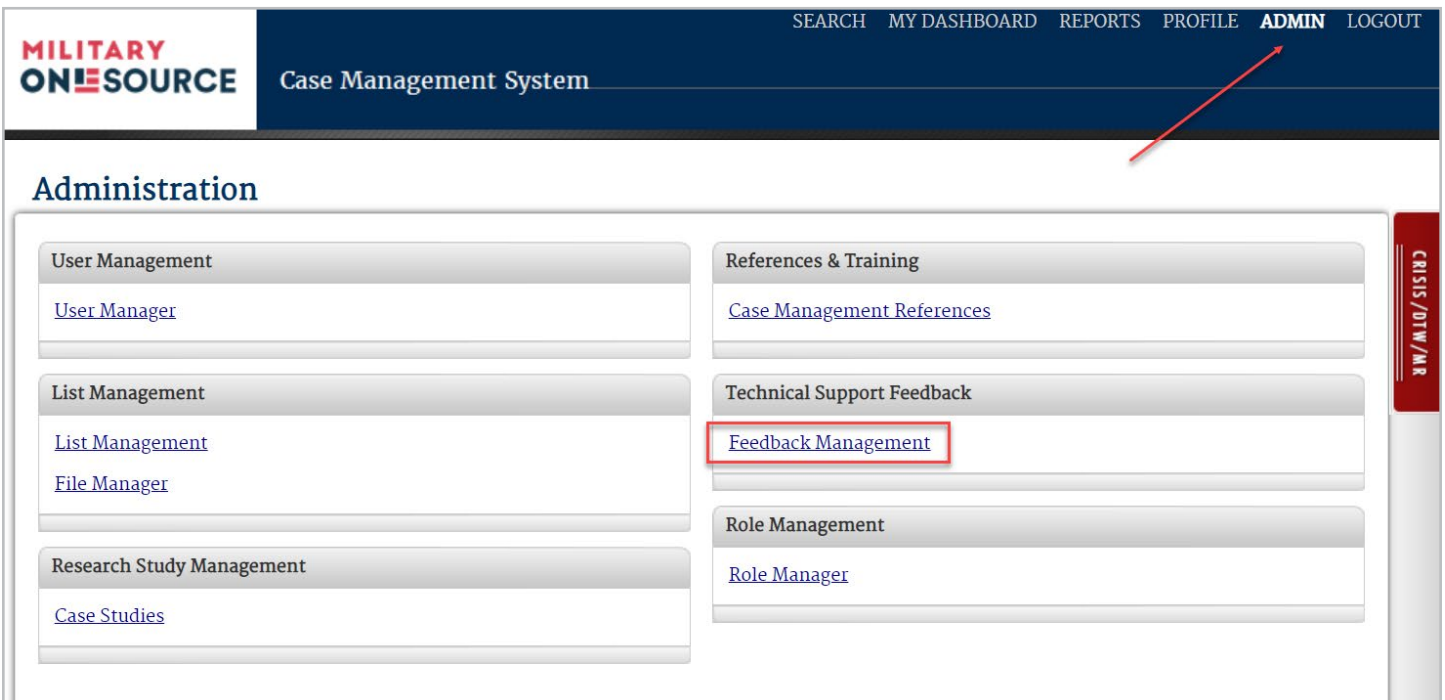


Figure 167



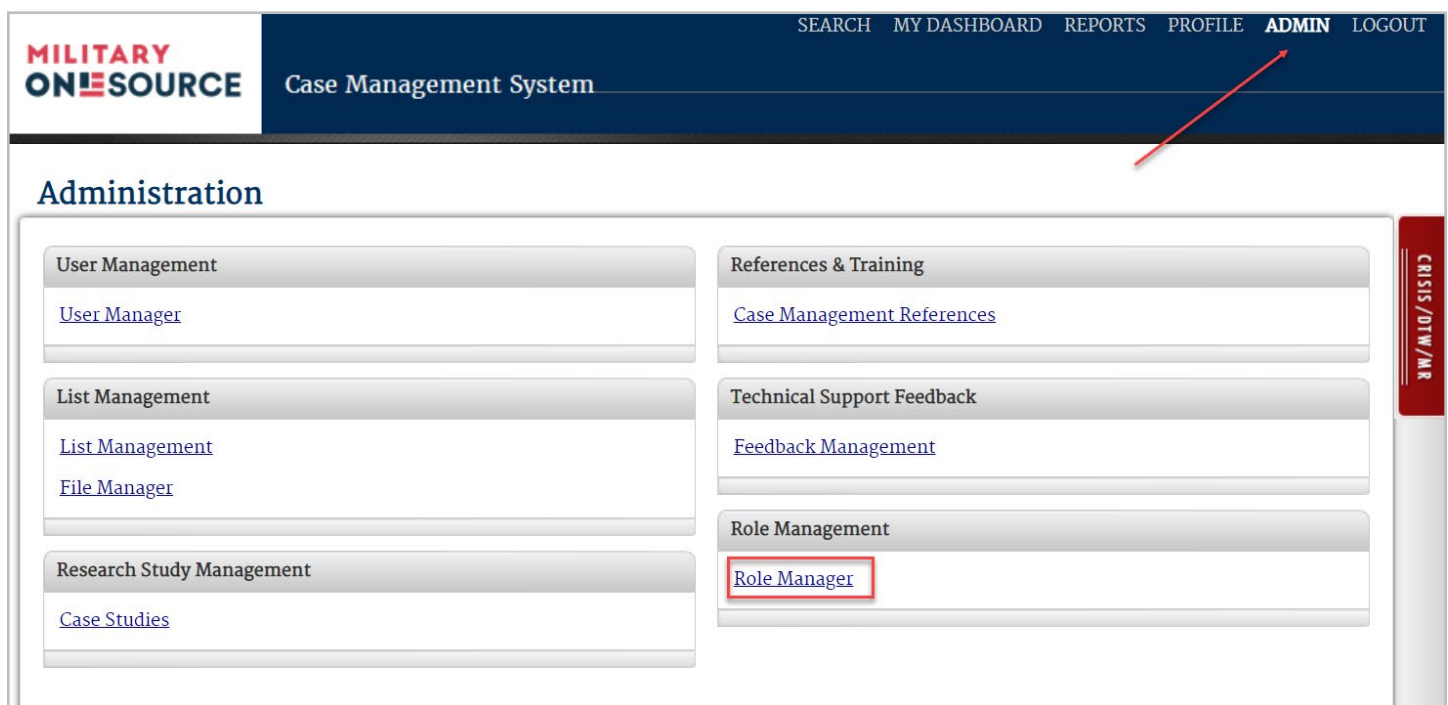
11.8. Role Management

11.8.1. WARNING

The Role Management section allows an Admin to create and manage roles and their permissions. Be aware that roles and permissions are complex and affect many users. The roles and permissions are set according to government specifications for the application. Roles and/or permissions should never be created or altered without direction and approval from the government.

11.8.2. MANAGING ROLES

The Role Management Page contains a list of all Roles in the eCMS.



SEARCH MY DASHBOARD REPORTS PROFILE **ADMIN** LOGOUT

MILITARY ONESOURCE Case Management System

Administration

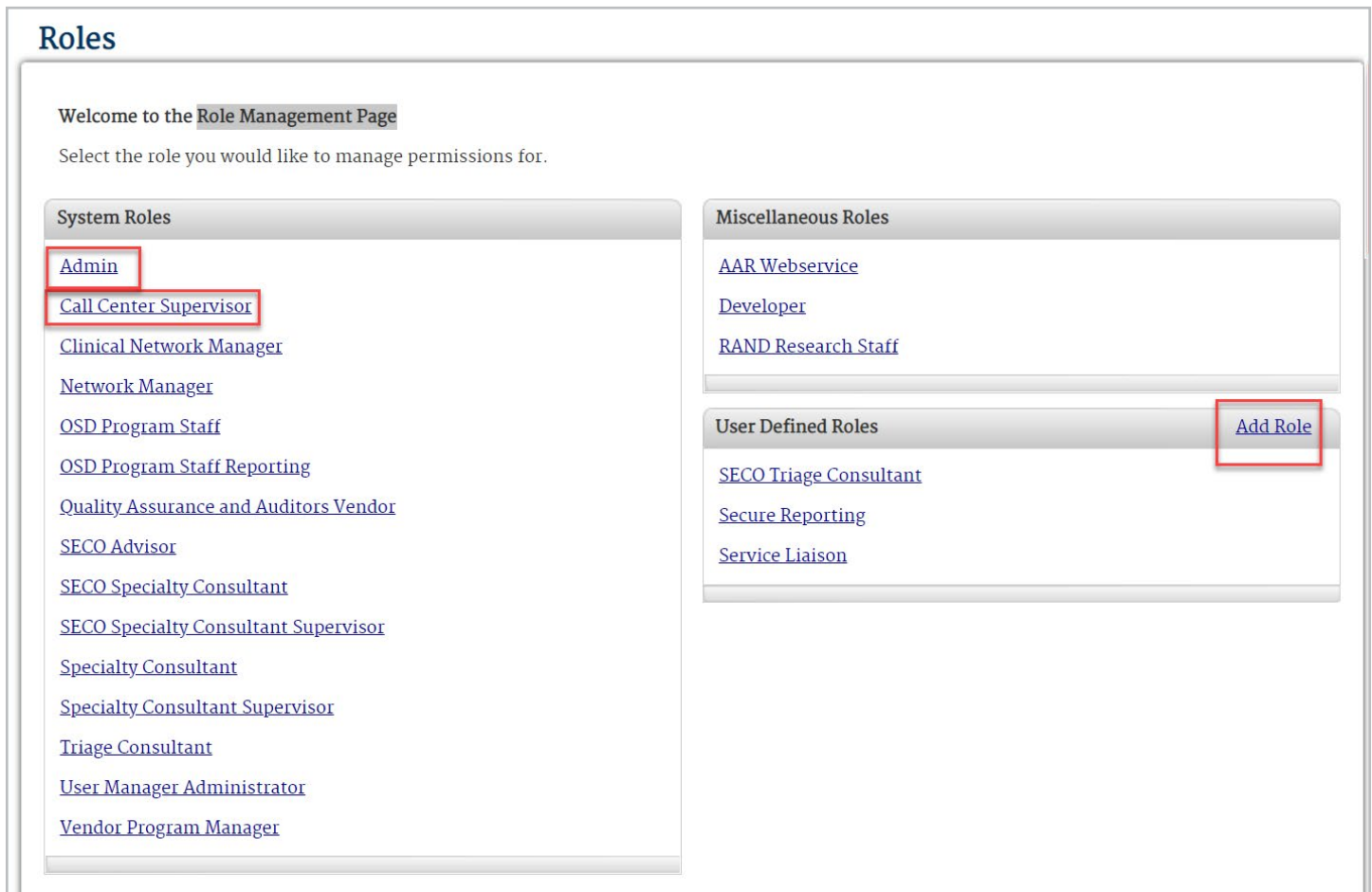
- User Management
 - [User Manager](#)
- List Management
 - [List Management](#)
 - [File Manager](#)
- Research Study Management
 - [Case Studies](#)
- References & Training
 - [Case Management References](#)
- Technical Support Feedback
 - [Feedback Management](#)
- Role Management
 - [Role Manager](#)

CRISIS / DTW / MR

Figure 168



Clicking the name of a Role will allow you to view and/or edit the permissions for the role. Selecting “Add Role” will allow you to enter a name for a new “User Defined Role” and add permissions. You will find the “Save” button at the bottom of the page. For a “User Defined Role” you will also have a button to “Disable” the role.



Roles

Welcome to the **Role Management Page**

Select the role you would like to manage permissions for.

| System Roles | Miscellaneous Roles |
|---|-------------------------------------|
| Admin | AAR Webservice |
| Call Center Supervisor | Developer |
| Clinical Network Manager | RAND Research Staff |
| Network Manager | |
| OSD Program Staff | |
| OSD Program Staff Reporting | |
| Quality Assurance and Auditors Vendor | |
| SECO Advisor | |
| SECO Specialty Consultant | |
| SECO Specialty Consultant Supervisor | |
| Specialty Consultant | |
| Specialty Consultant Supervisor | |
| Triage Consultant | |
| User Manager Administrator | |
| Vendor Program Manager | |

| User Defined Roles |
|--|
| SECO Triage Consultant |
| Secure Reporting |
| Service Liaison |

Add Role

Figure 169



Edit Role: Admin

Permissions

Admin

Miscellaneous

- Admin Access the Admin Link
- ManageLists Access List Management
Access Case Study Management
- ProgramStaff Sends user to Reports as home page if other permissions do not exist
- Report Access Reports Link

Role Management

- Create Create a User-Defined Role
- Delete Disable a User-Defined Role
- Read Access the Role Management Link
Access the Role Management
- Update Edit a User-Defined Role

User Management

- Create Invite new user

Figure 170



12. Requesting Support

If you need assistance with an issue in the eCMS, help is close by. Simply click the “Feedback” link in the footer of any page, fill out a support request, and someone will respond in a timely manner. Watch your email for correspondence concerning your support ticket where someone will work with you to resolve your issue. You may need to check your spam/junk folders.

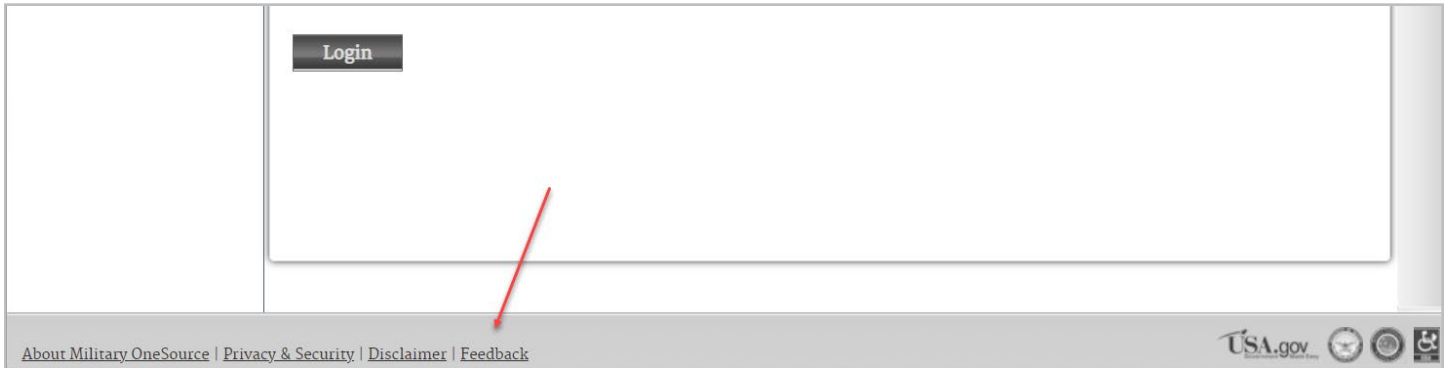


Figure 171