


TEST ENVIRONMENT - PRE CUI



Case Management System

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**DASHBOARD**

**PARTICIPANT OVERVIEW**

Name

Participant ID

Current Address

DOB

[My Dashboard](#)

## Create New Participant \* indicates a required field

\*First

Middle

\*Last

Suffix

\*DOB

\*Sex

\*Marital Status

Current Address

Please Select

Address (continue)

Male

Female

Not Reported

City

State

Postal Code

Country

Preferred Phone

☐ Confidential

Work Phone

Cell Phone

☐ Confidential

Email Address

☐ Confidential

☐ Requires Interpreter

Please Select

\*Receive Outreach Communications

Please Select

How did the contact participant hear about the program?

Please Select

Other Source

Time Zone

Please Select

☐ 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


☐ Wounded Warrior

\*Assigned Installation

Please enter 1 or more characters

Explain selection of "Other" or "Unknown"

☐ Administrative Notes Need Review



Administrative Notes [add](#)

CRISIS /DTW/MR



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   
[Jane Q Doe](#)

Participant ID  
1518748

Current Address  
123 Test Drive  
Ville, SD 55555  
United States

**Participant Name and Information**

First	Middle	Last	Suffix
Jane	Q	Doe	

DOB **Sex** Marital Status  
2/2/2018 Female Single

**Eligibility Info**

Service Member?  
No

Relation

**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
Jane	Q	Doe	

DOB **Sex** Marital Status  
2/1/1996 Female Single

**Eligibility Info**

Service Member?  
Yes

Relation  
Self

Figure 37



## 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 **Sex** 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