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 February 2025

MILITARY ONESOURCE

Table of Contents

1. Your User Account

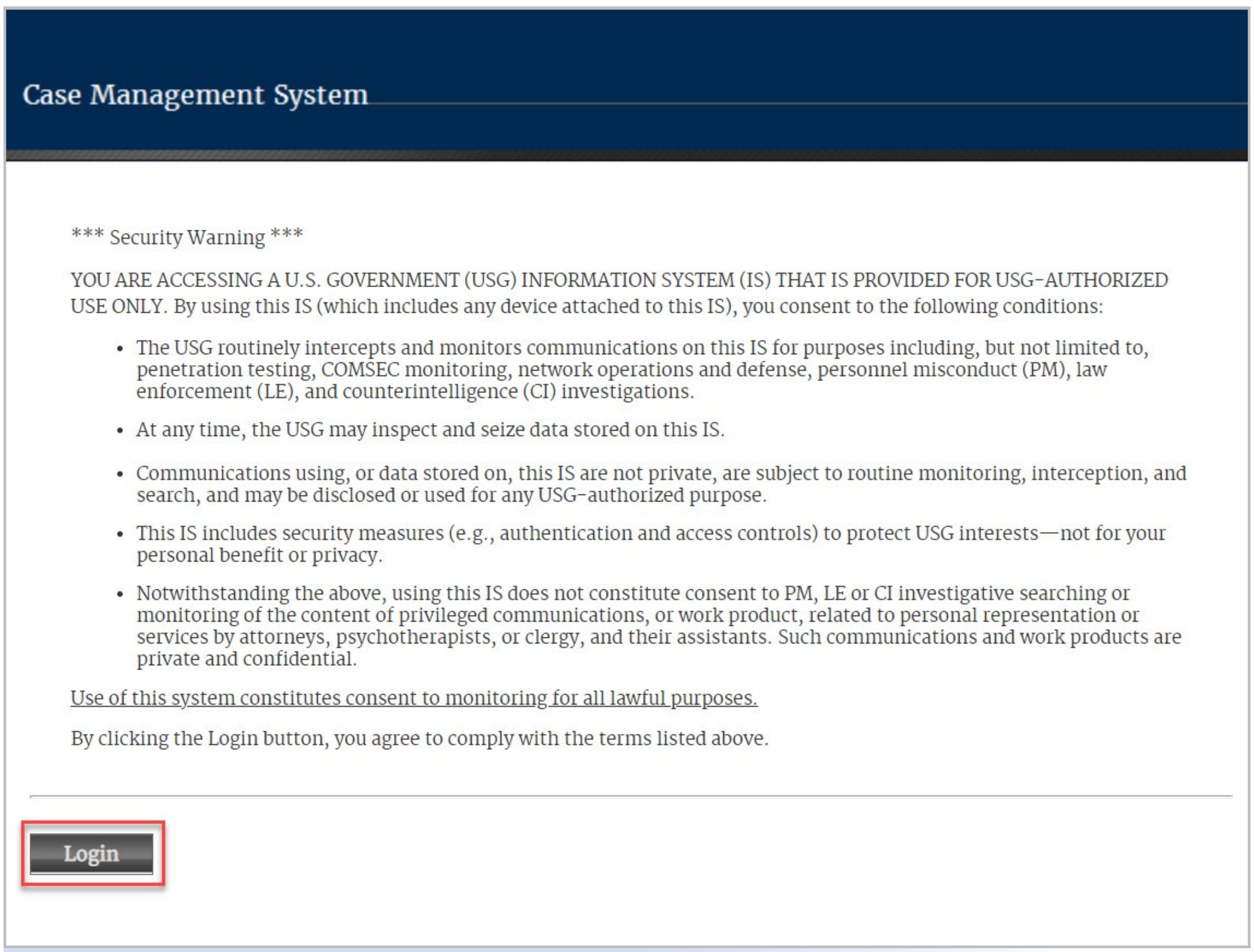
1.1. Register as a User

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.

Login

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.

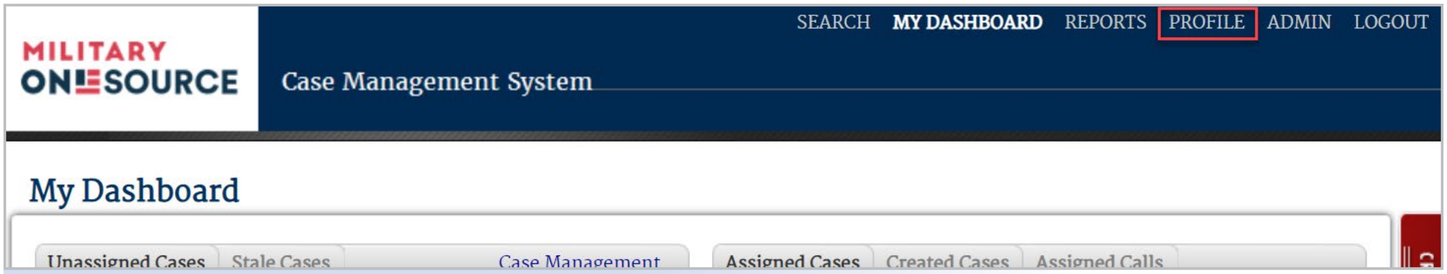


Figure 2

Simply make your changes and click "Submit" to save.

MILITARY ONESOURCE

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.

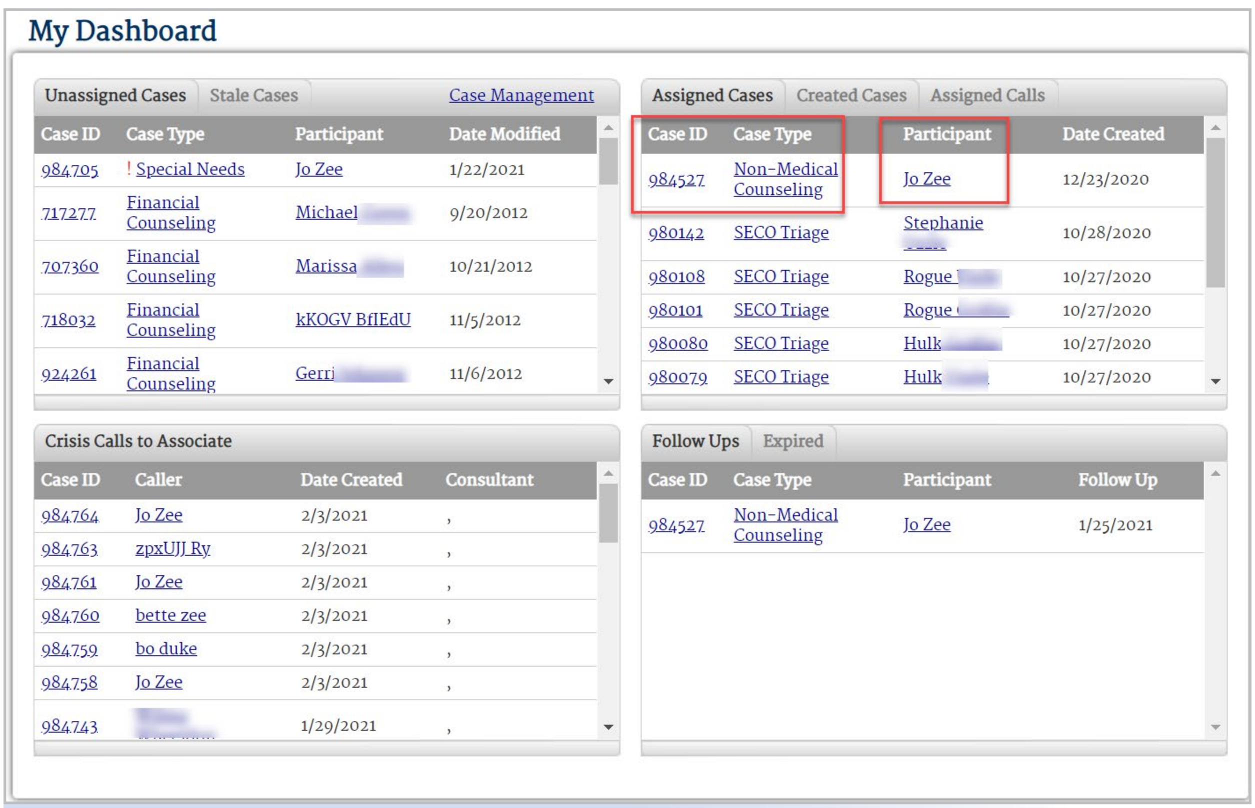


Figure 4

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.

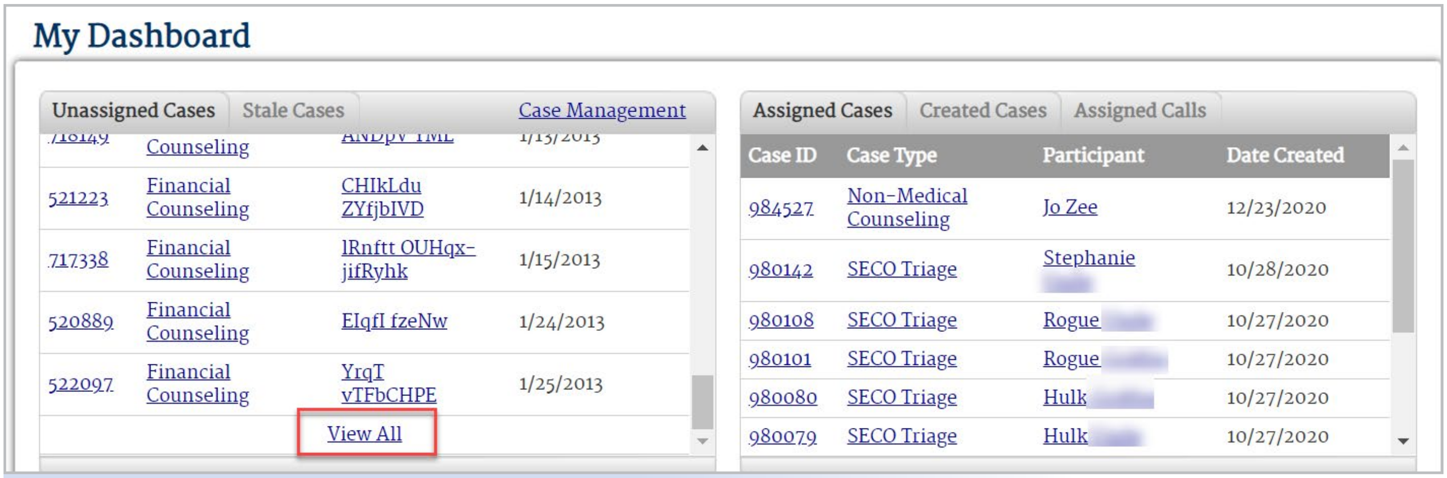


Figure 5

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

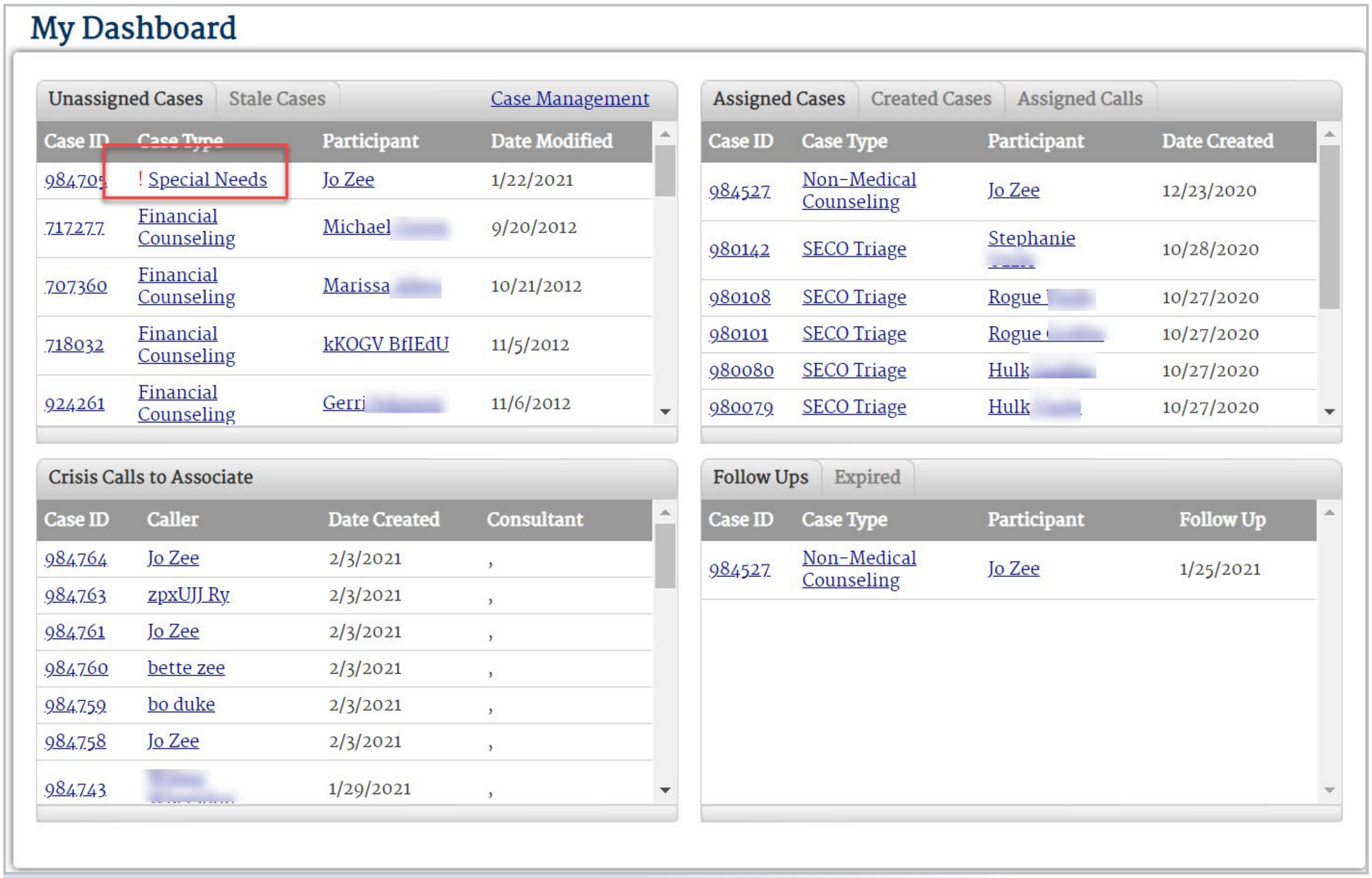


Figure 6

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.

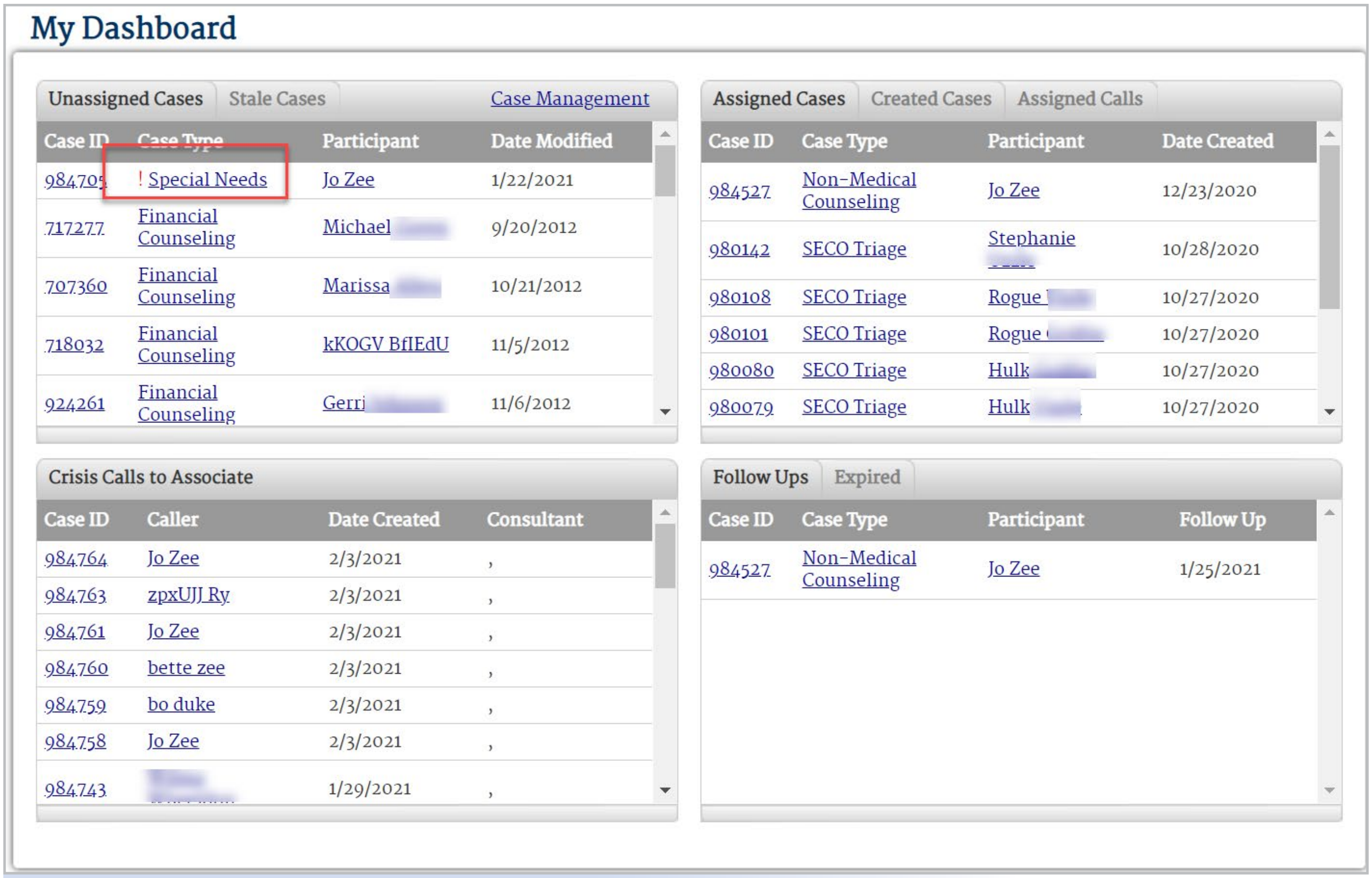


Figure 7

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.

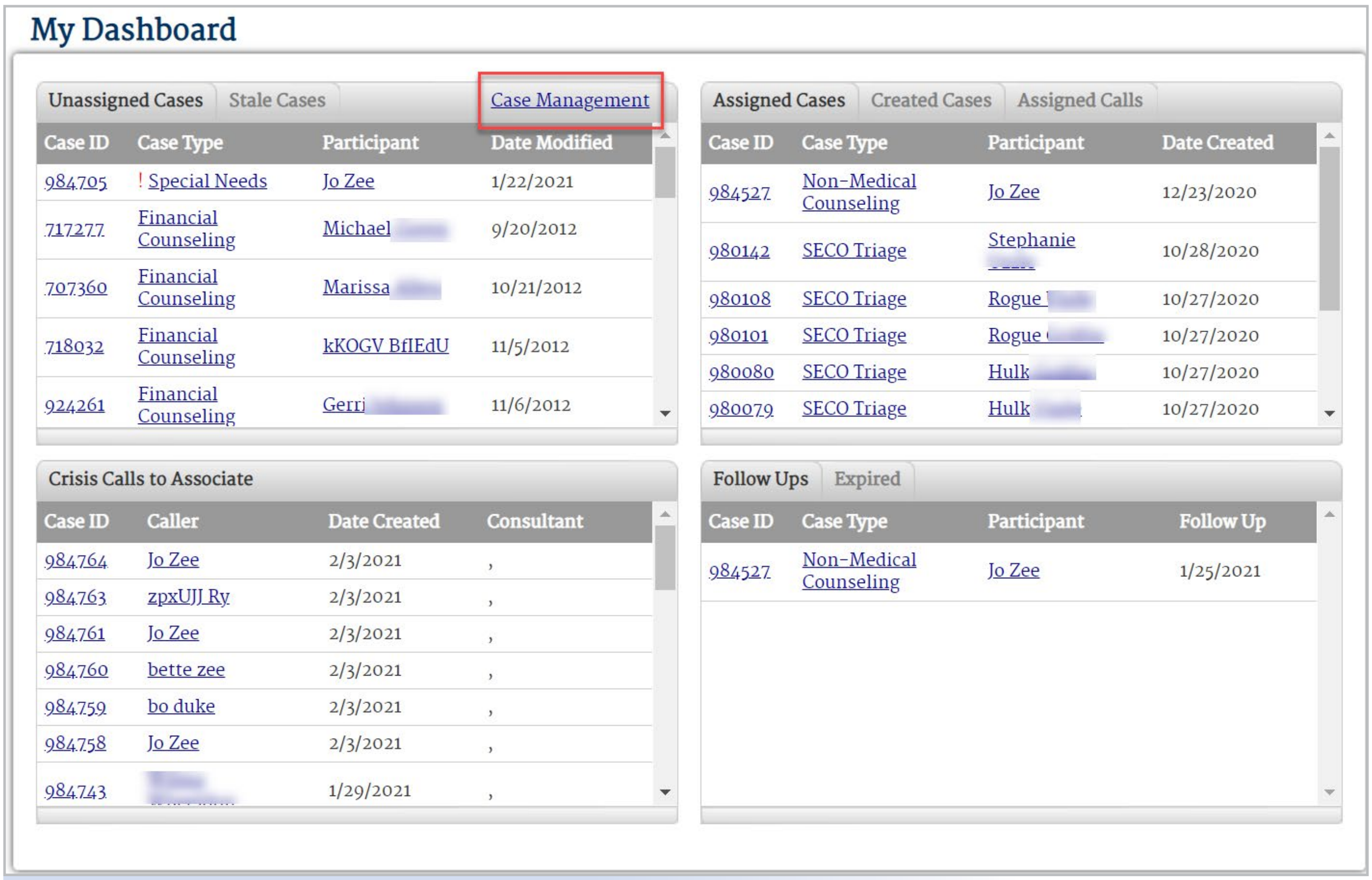


Figure 8

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

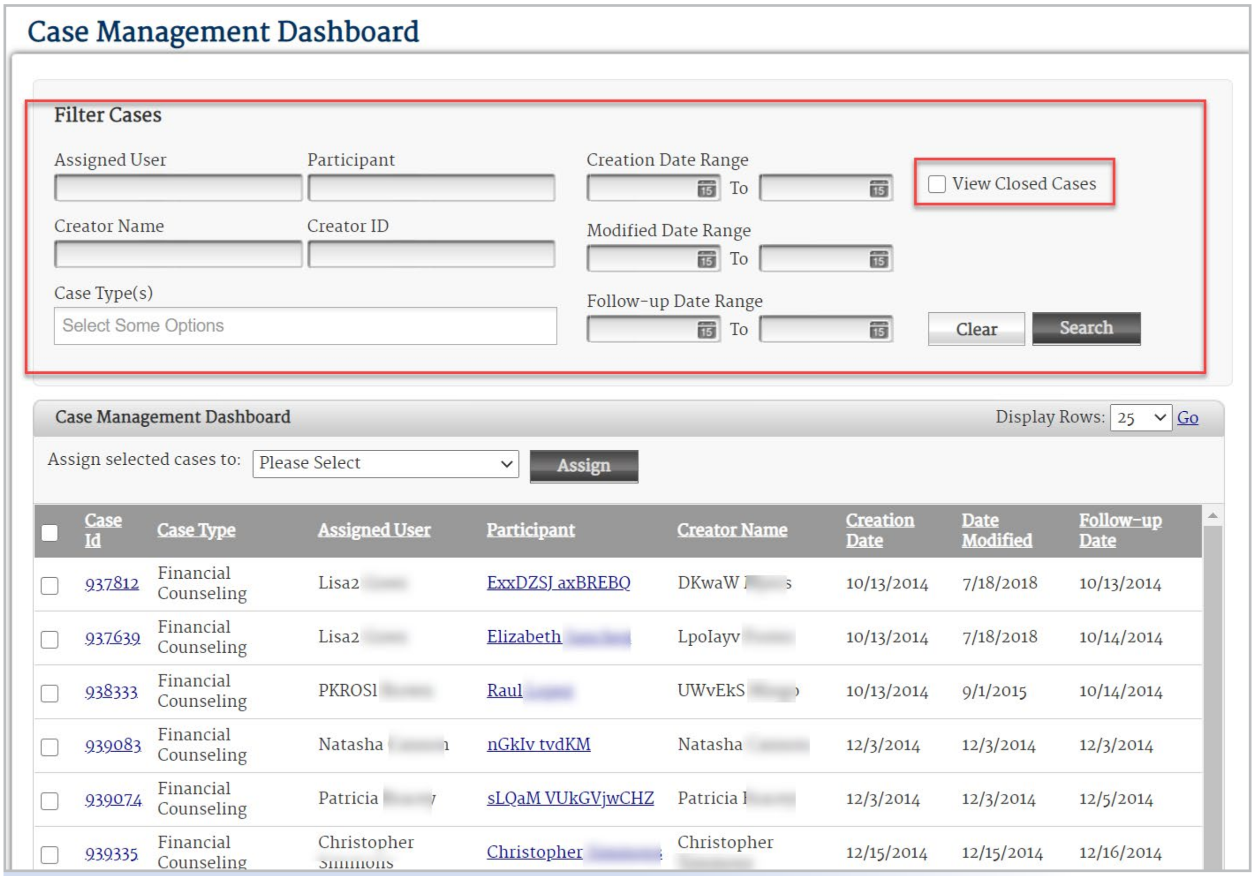


Figure 9

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

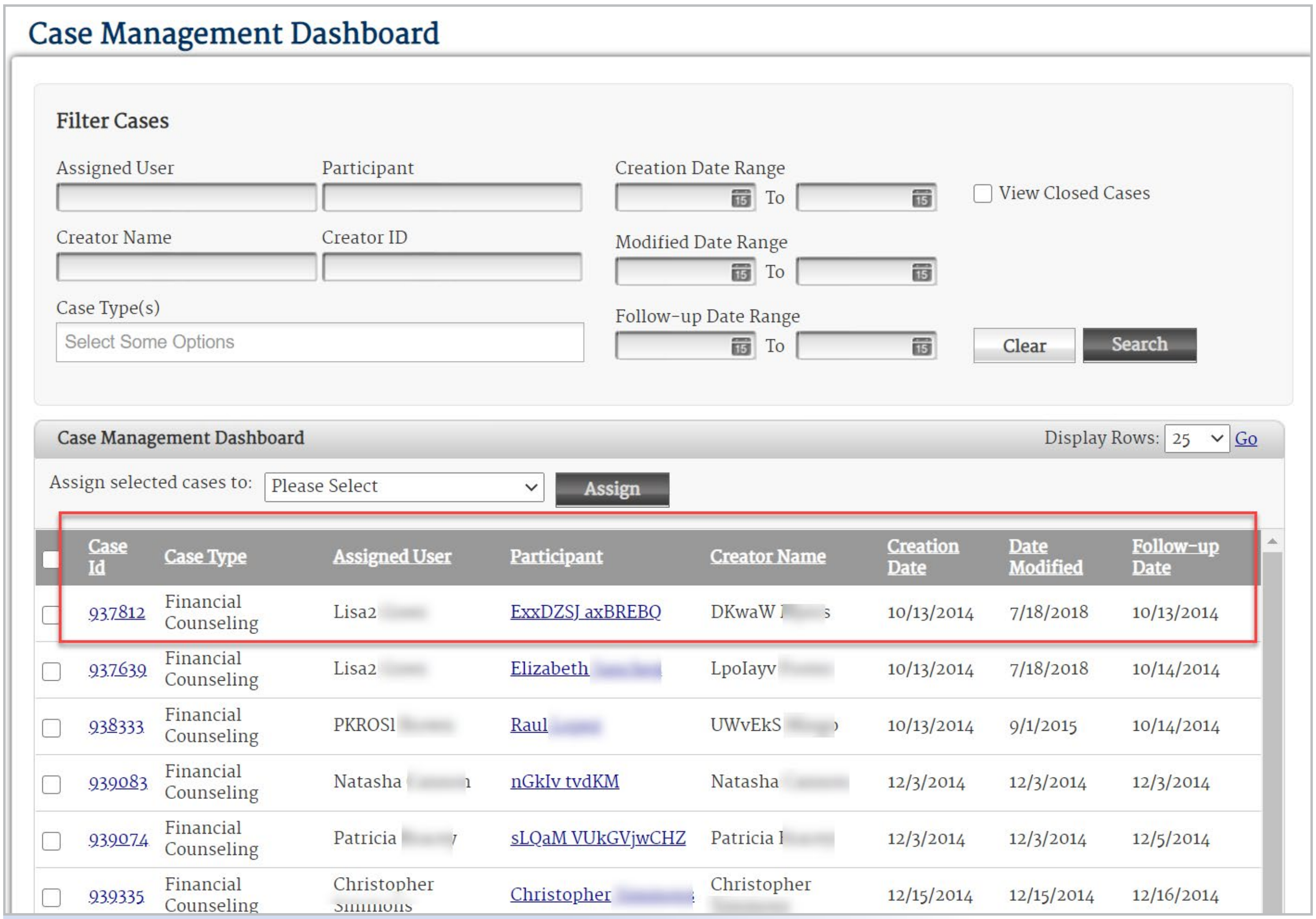


Figure 10

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."

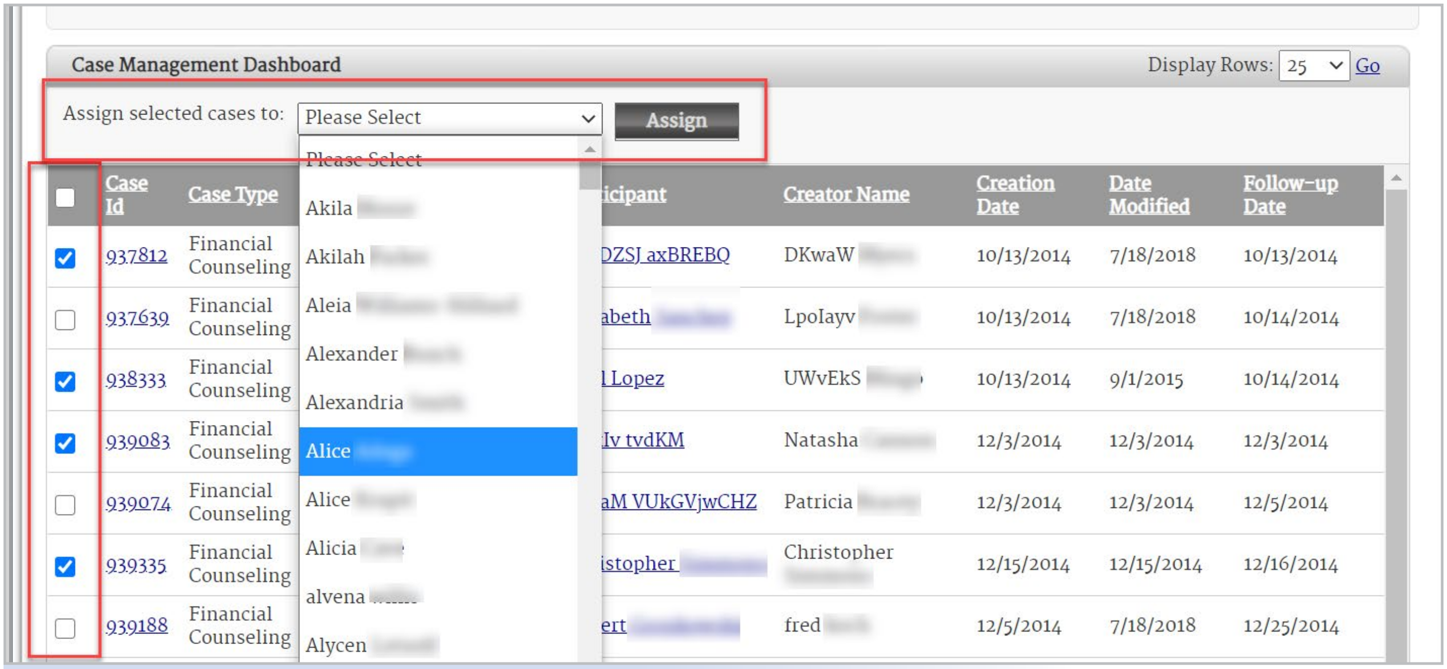


Figure 11

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.

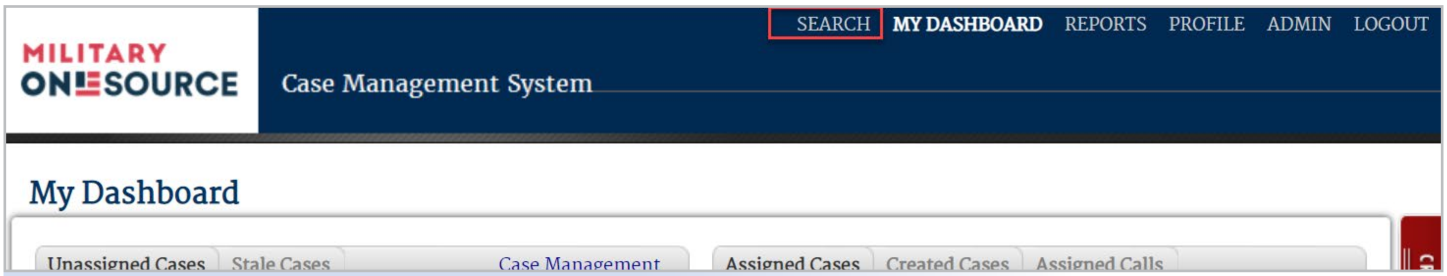


Figure 12

"Search Type" is set to search for Participants by default, but you can also search for "Parent/Guardian" or "Service Provider".

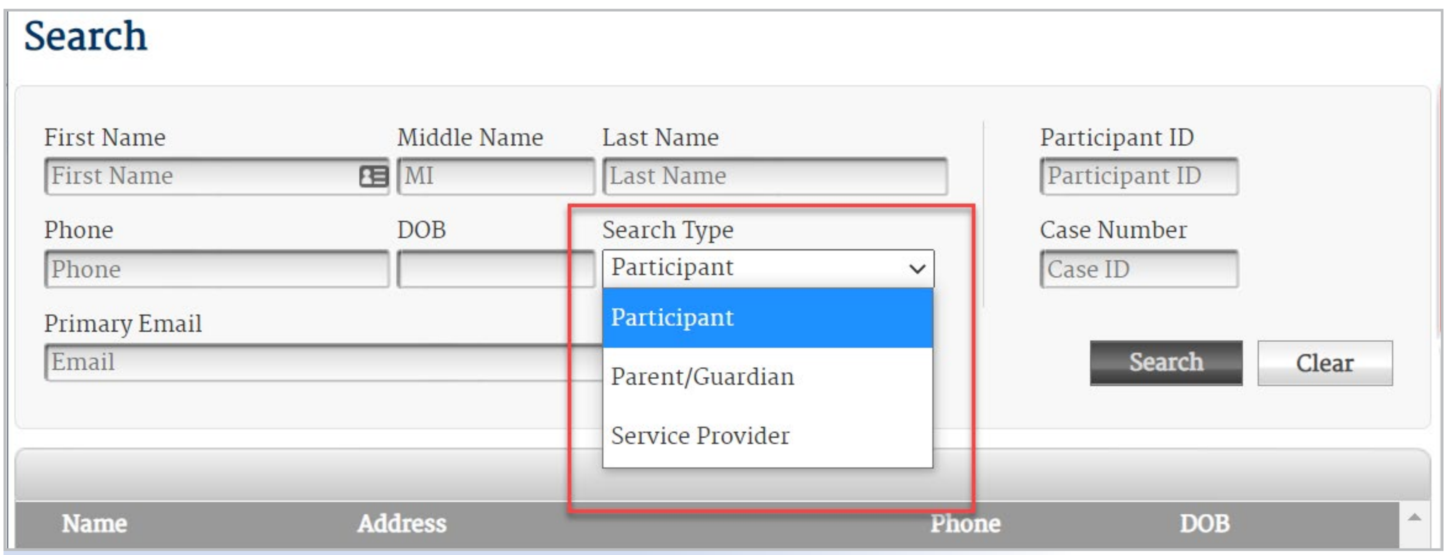


Figure 13

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

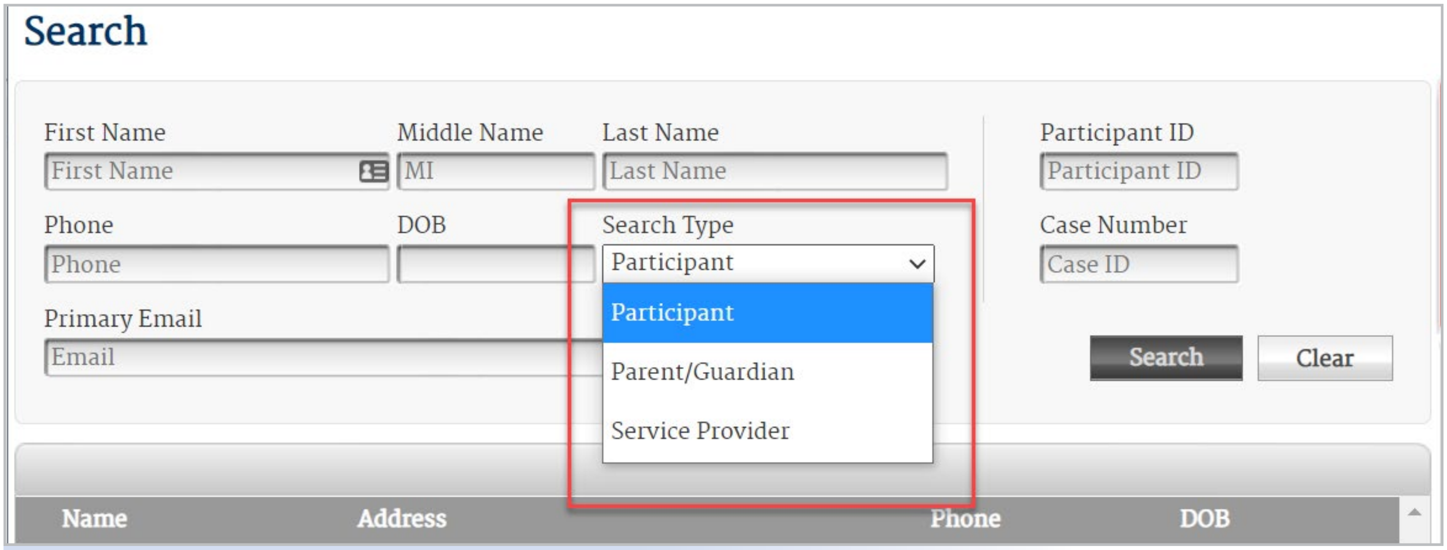


Figure 14

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.

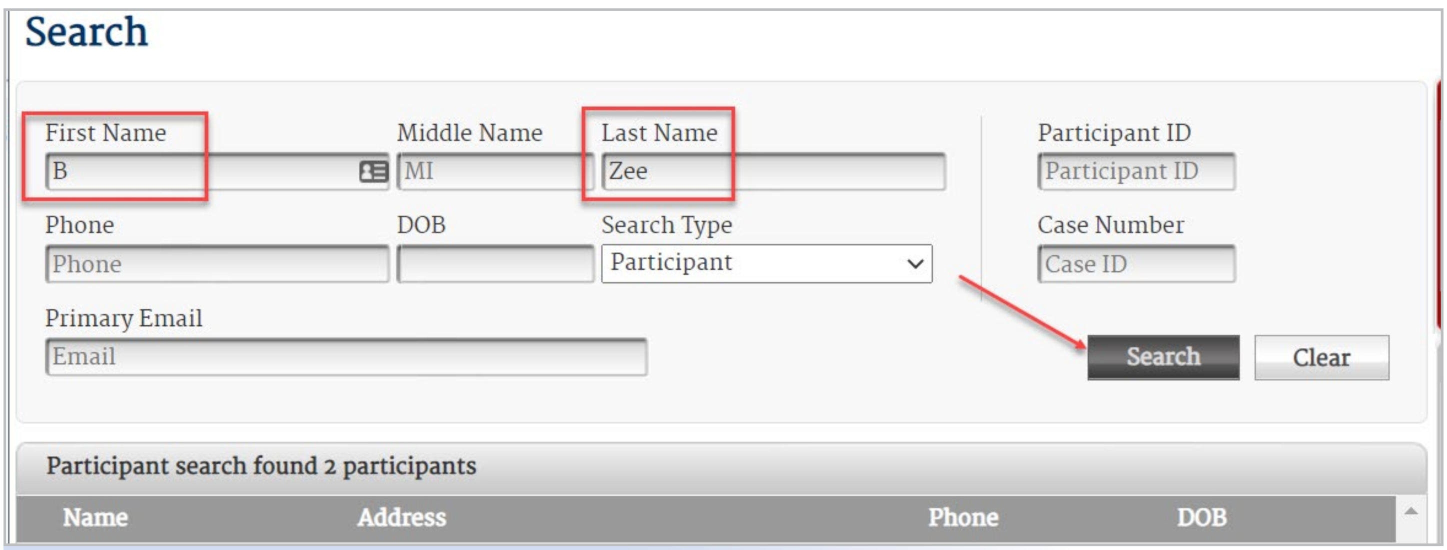


Figure 15

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.

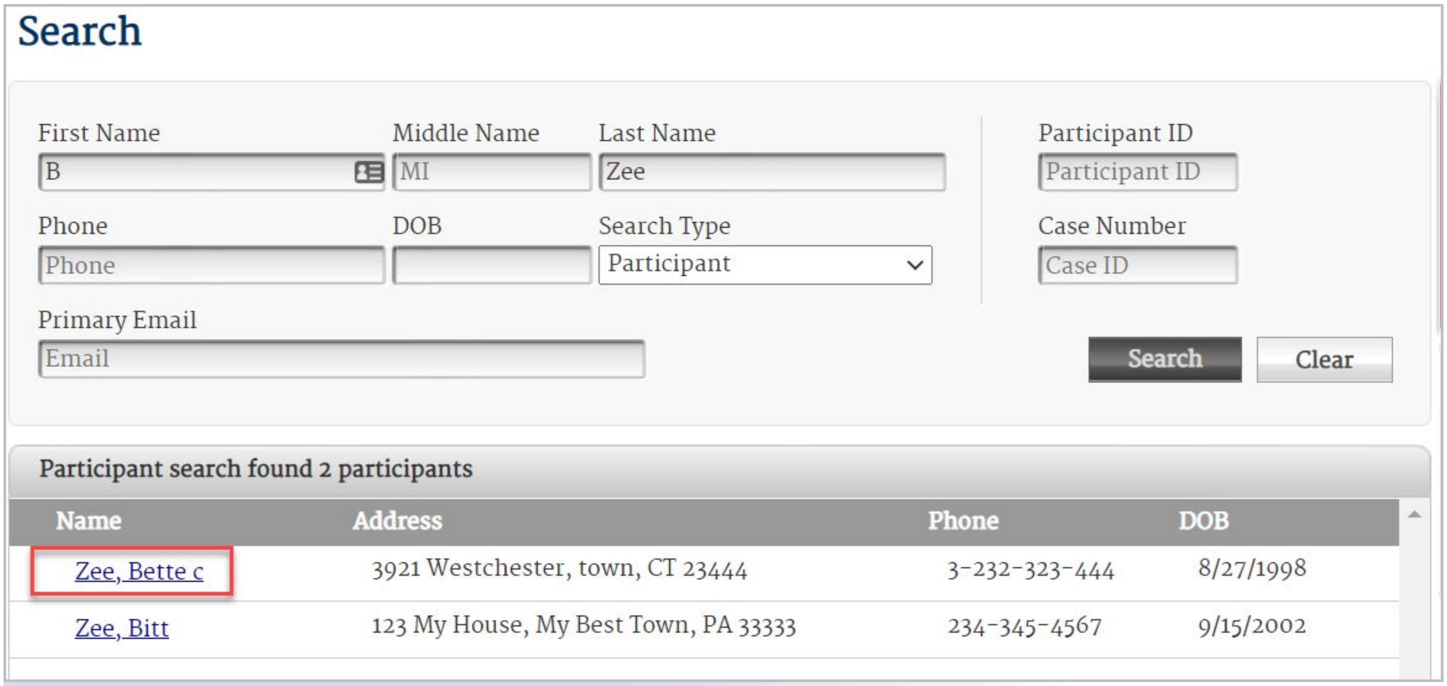


Figure 16

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.

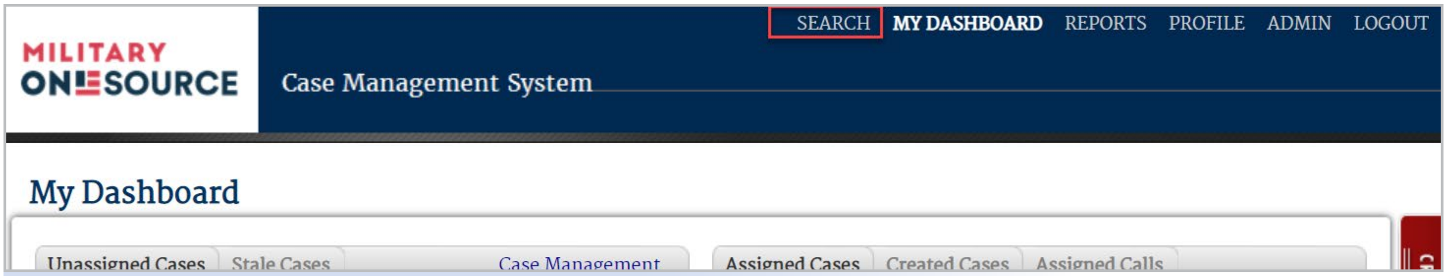


Figure 17

"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.

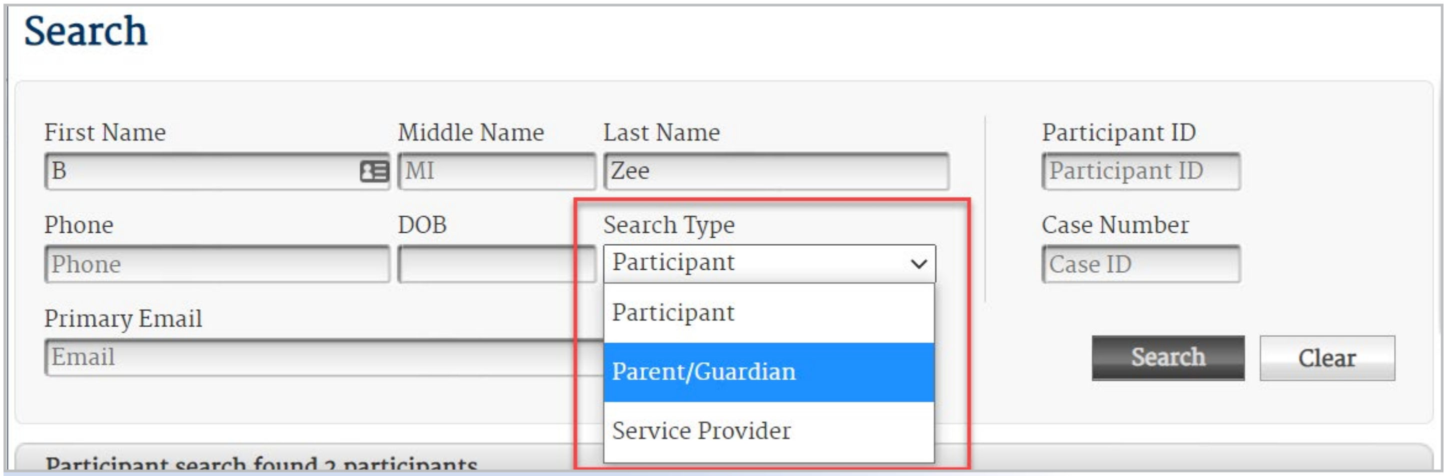


Figure 18

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.

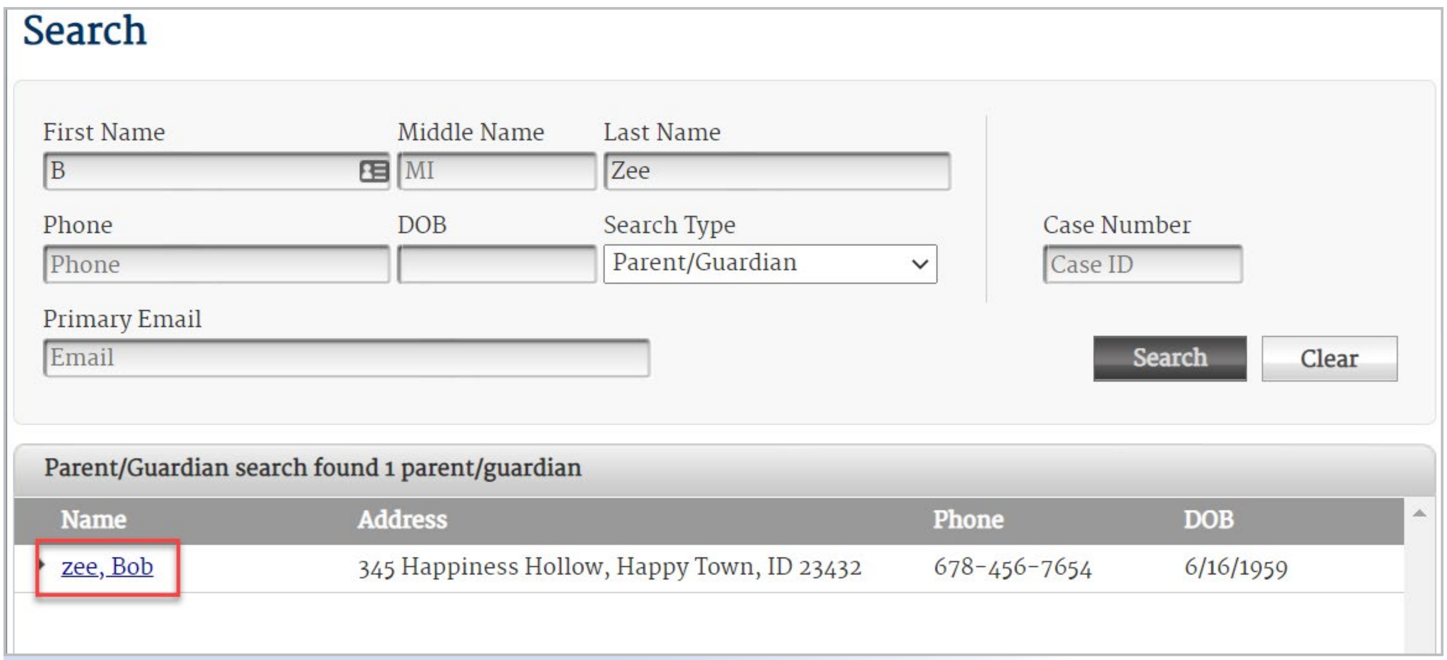


Figure 19

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.

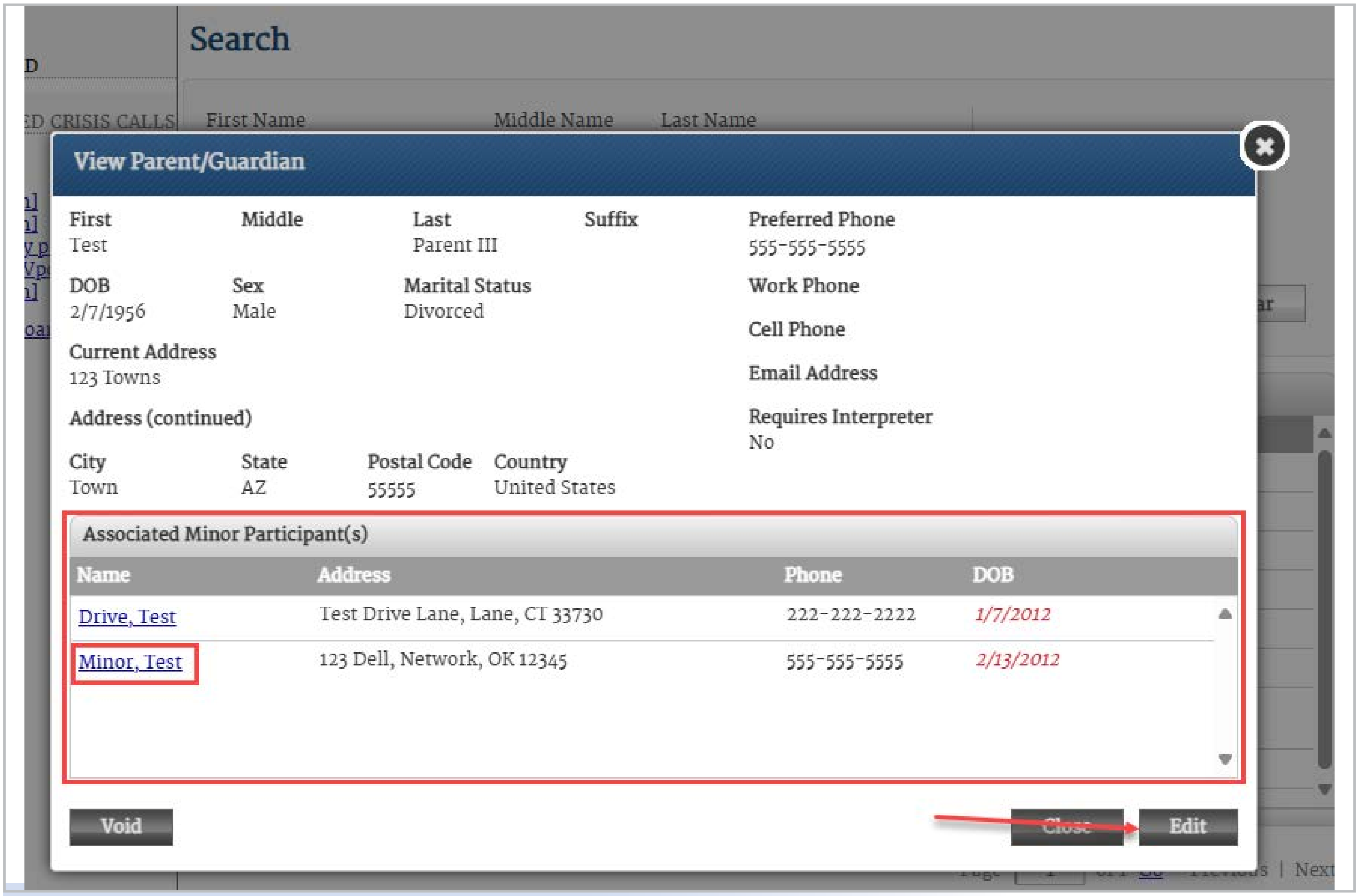


Figure 20

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.

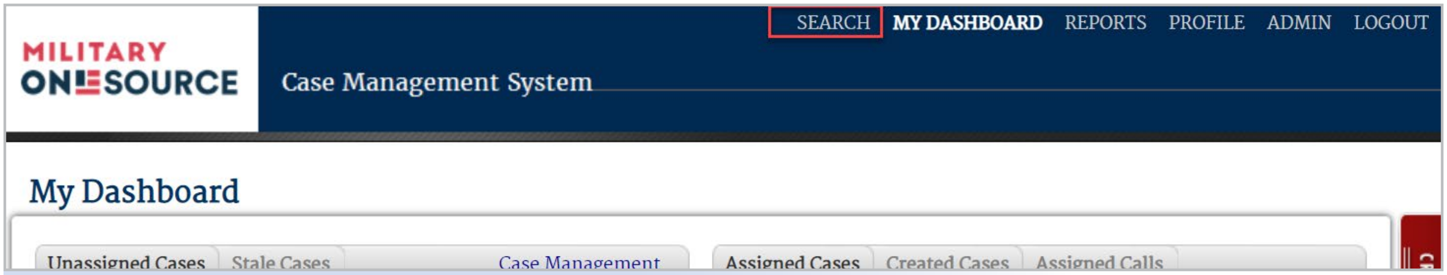


Figure 21

"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.

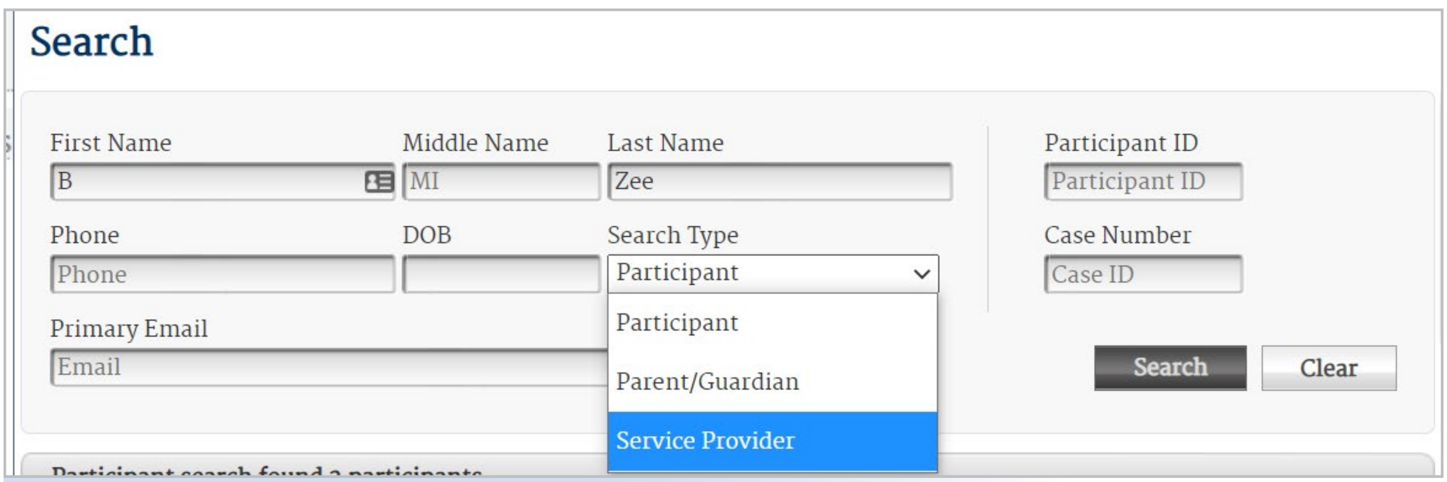


Figure 22

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.

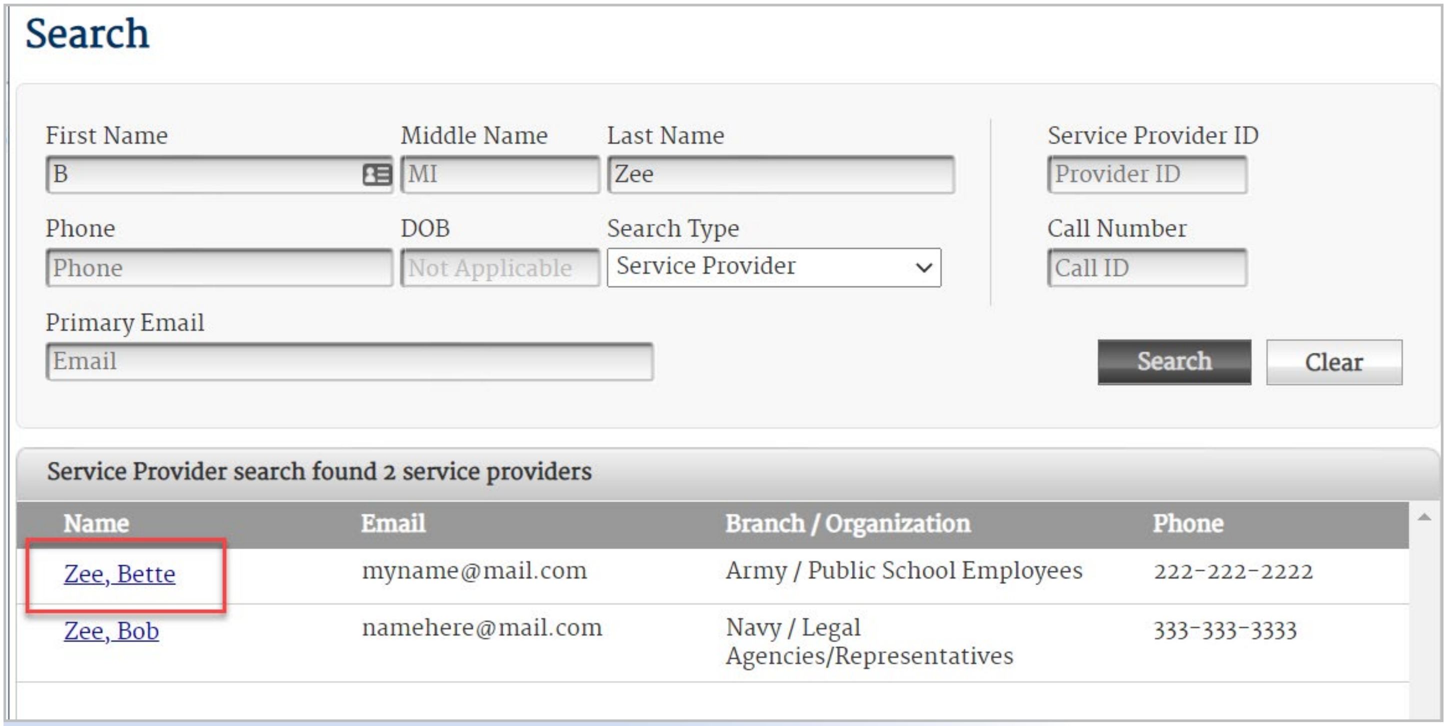


Figure 23

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.

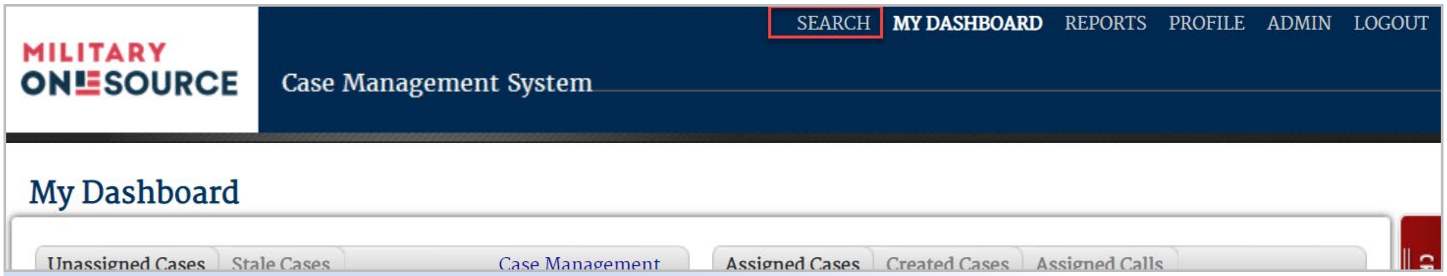


Figure 24

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

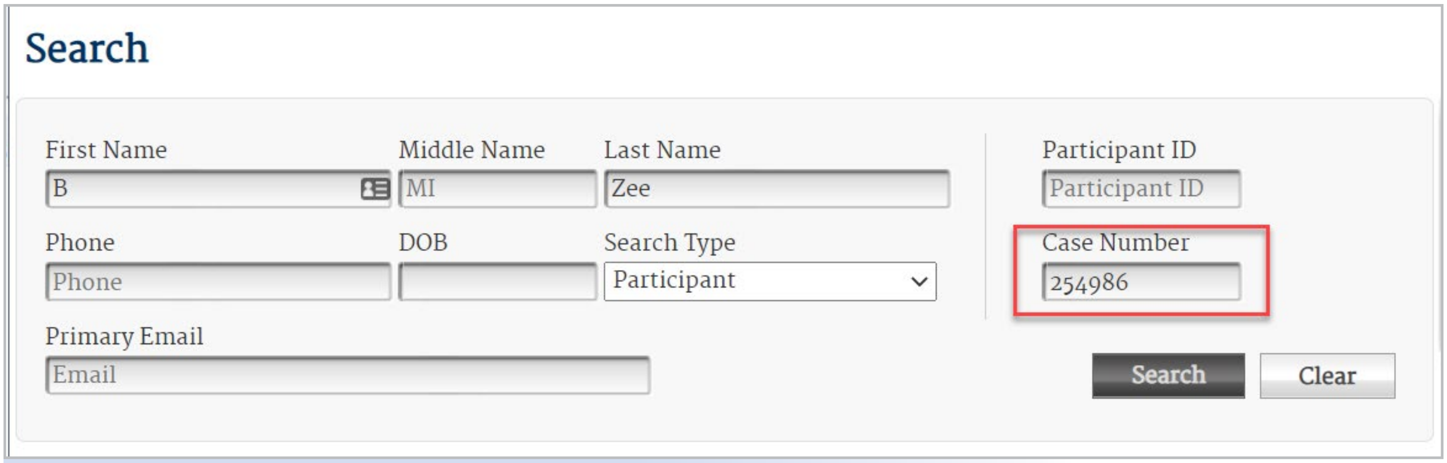


Figure 25

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.

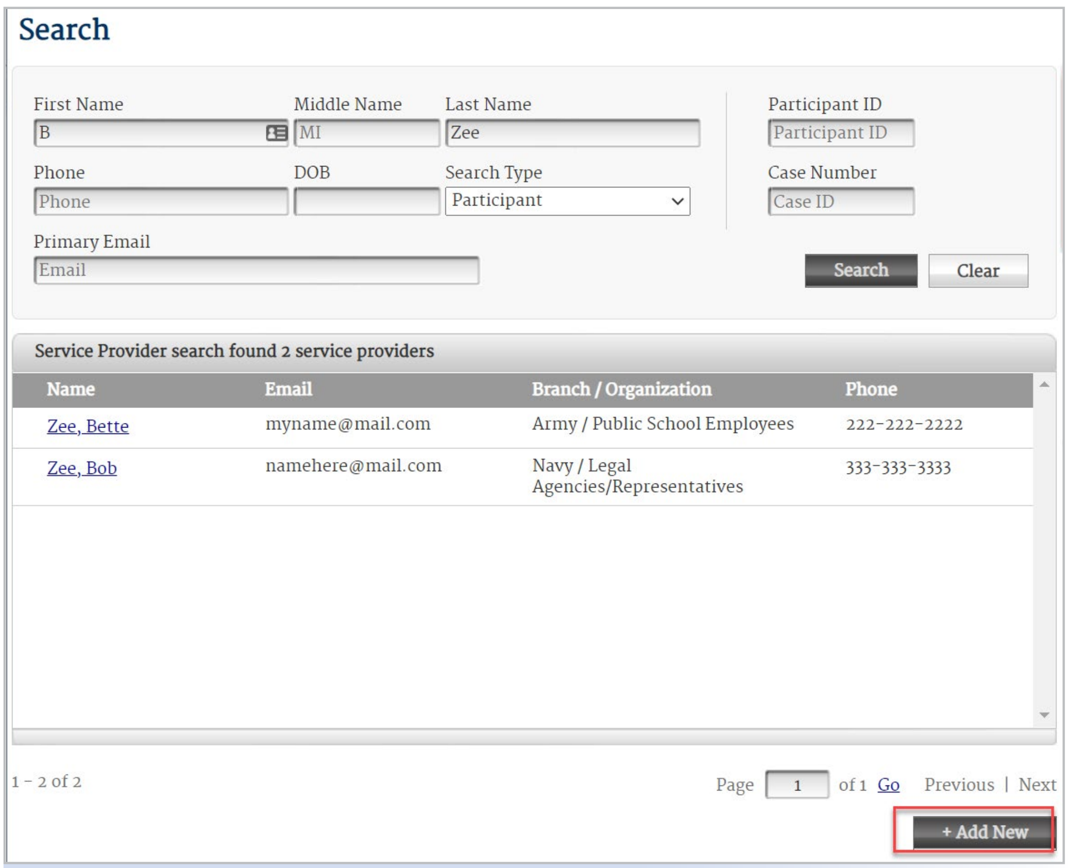


Figure 26

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), sex, 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.

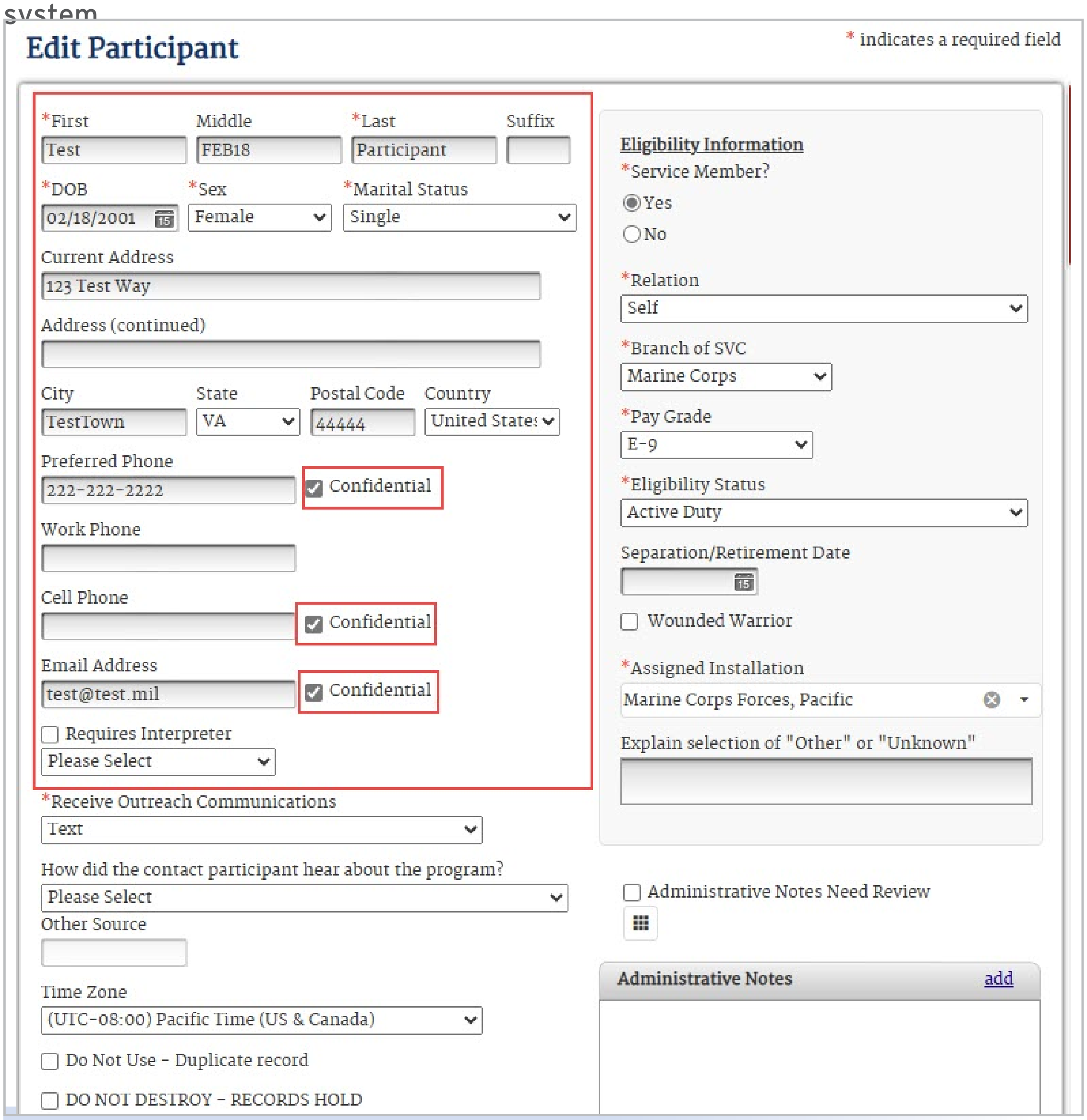
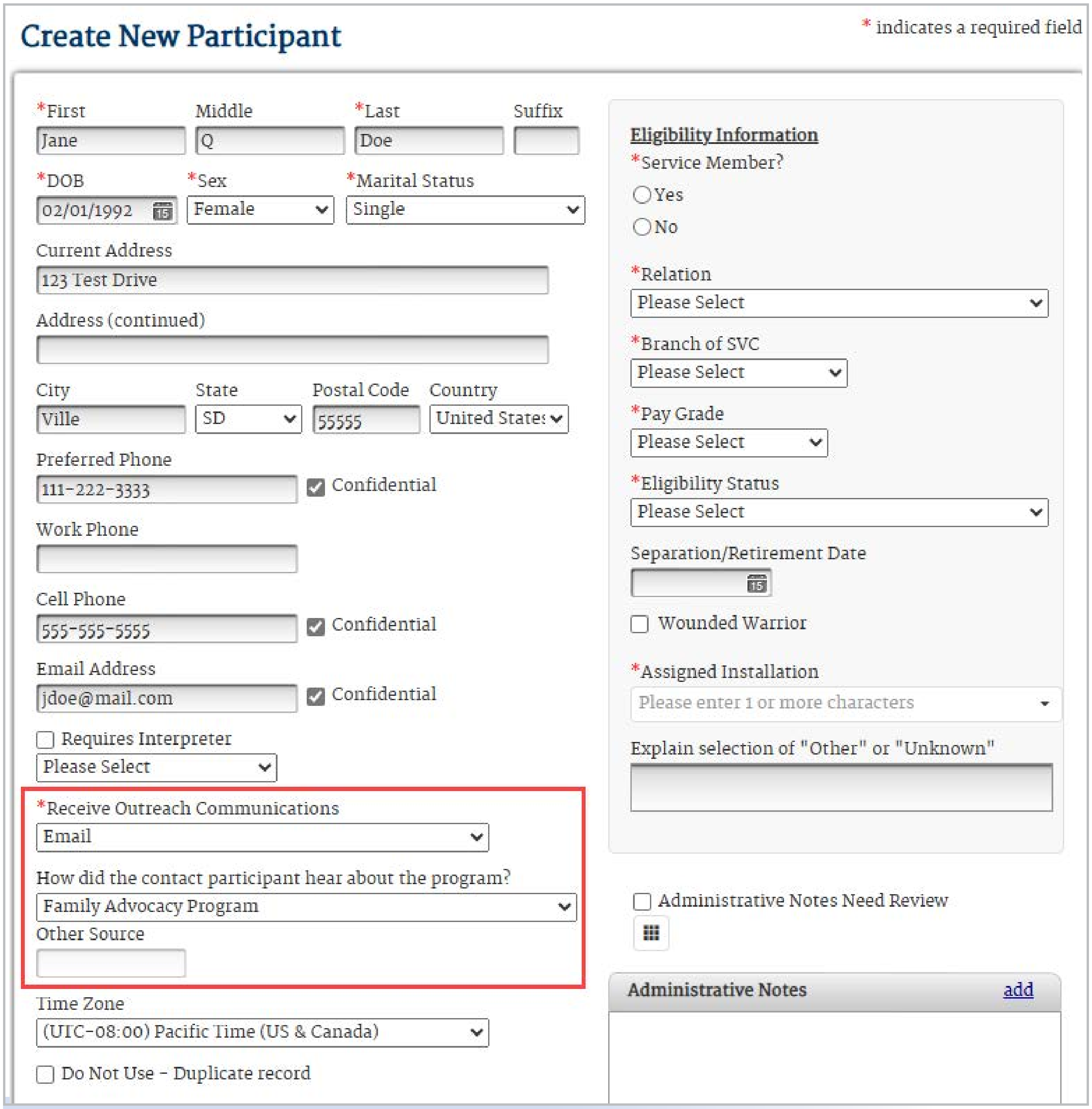


Figure 27

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: Jane
Middle: Q
*Last: Doe
Suffix:
*DOB: 02/01/1992
*Sex: Female
*Marital Status: Single
Current Address: 123 Test Drive
Address (continued):
City: Ville
State: SD
Postal Code: 55555
Country: United States
Preferred Phone: 111-222-3333 Confidential
Work Phone:
Cell Phone: 555-555-5555 Confidential
Email Address: jdoe@mail.com Confidential
Requires Interpreter
Please Select
*Receive Outreach Communications: Email
How did the contact participant hear about the program?: Family Advocacy 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:
Wounded Warrior
*Assigned Installation: Please enter 1 or more characters
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.

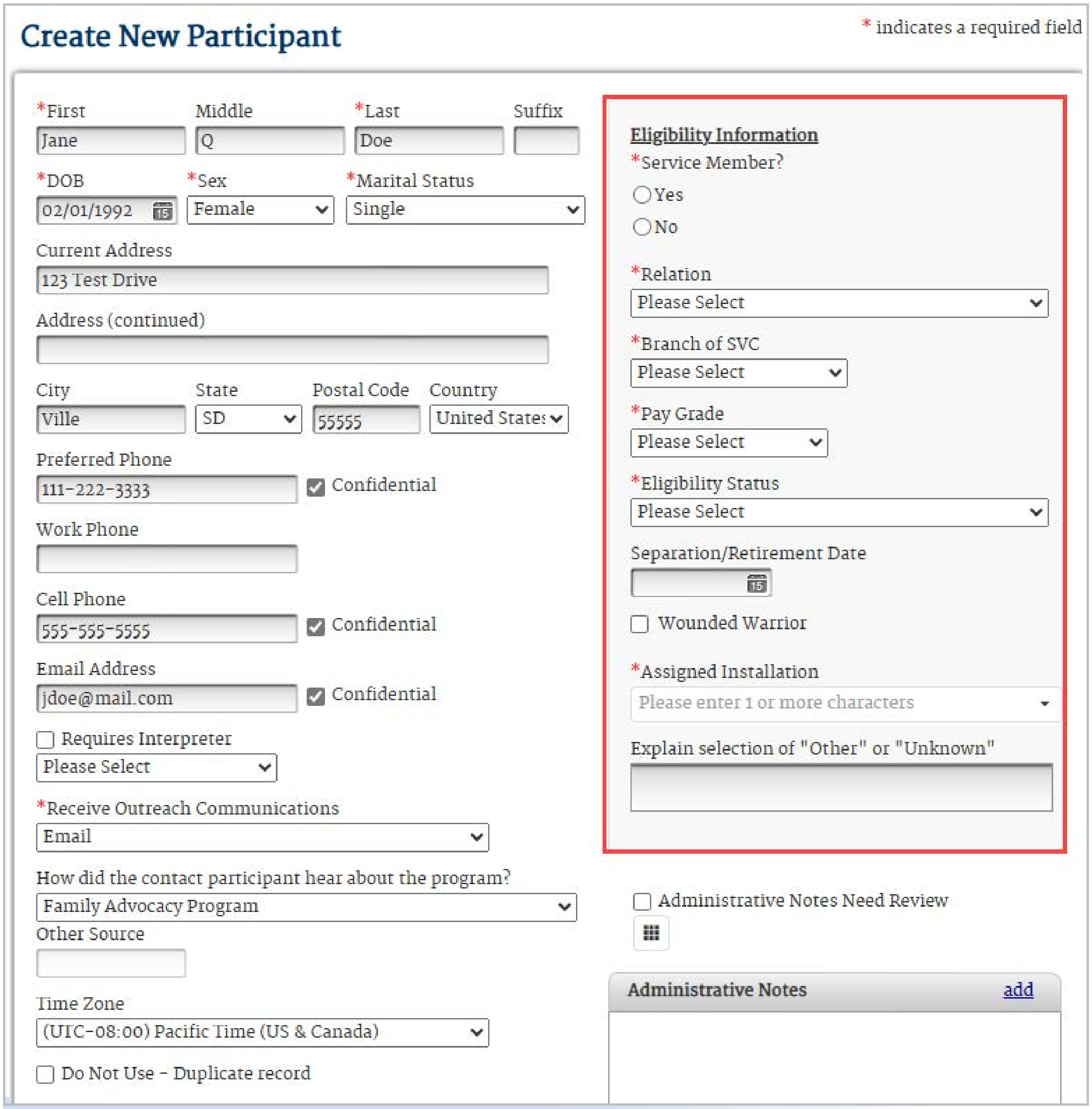
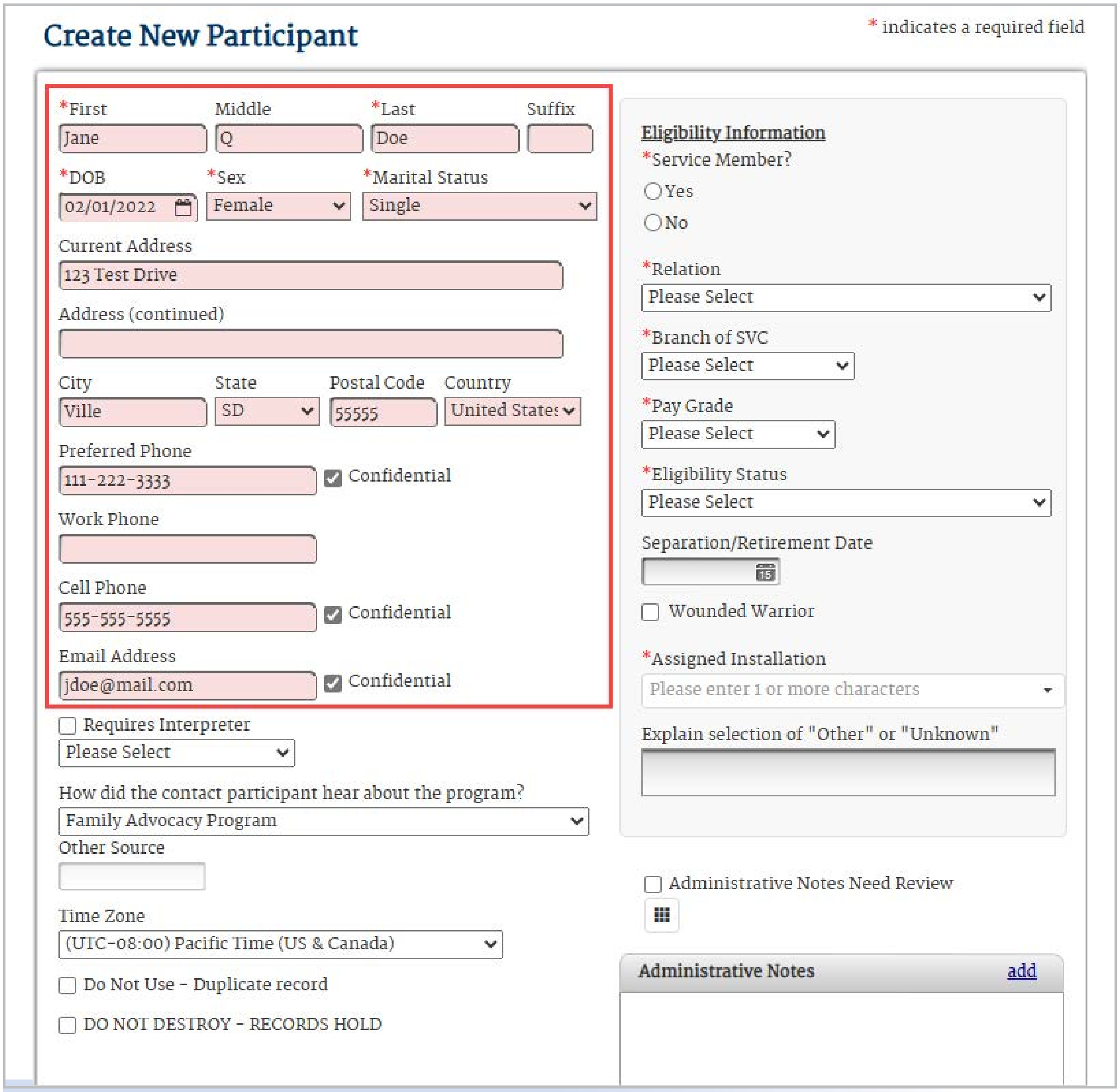


Figure 29

If a Participant is a Minor, you will see the personal information fields are red.



Create New Participant

* indicates a required field

*First: Jane
Middle: Q
*Last: Doe
Suffix:
*DOB: 02/01/2022
*Sex: Female
*Marital Status: Single
Current Address: 123 Test Drive
Address (continued):
City: Ville
State: SD
Postal Code: 55555
Country: United States
Preferred Phone: 111-222-3333 — Confidential
Work Phone:
Cell Phone: 555-555-5555 — Confidential
Email Address: jdoe@mail.com — Confidential
Requires Interpreter
Please Select
How did the contact participant hear about the program?
Family Advocacy Program
Other Source
Time Zone
(UTC-08:00) Pacific Time (US & Canada)
Do Not Use - Duplicate record
DO NOT DESTROY - RECORDS HOLD

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

Figure 30

Also, a Parent/Guardian section is included at the bottom of the screen.

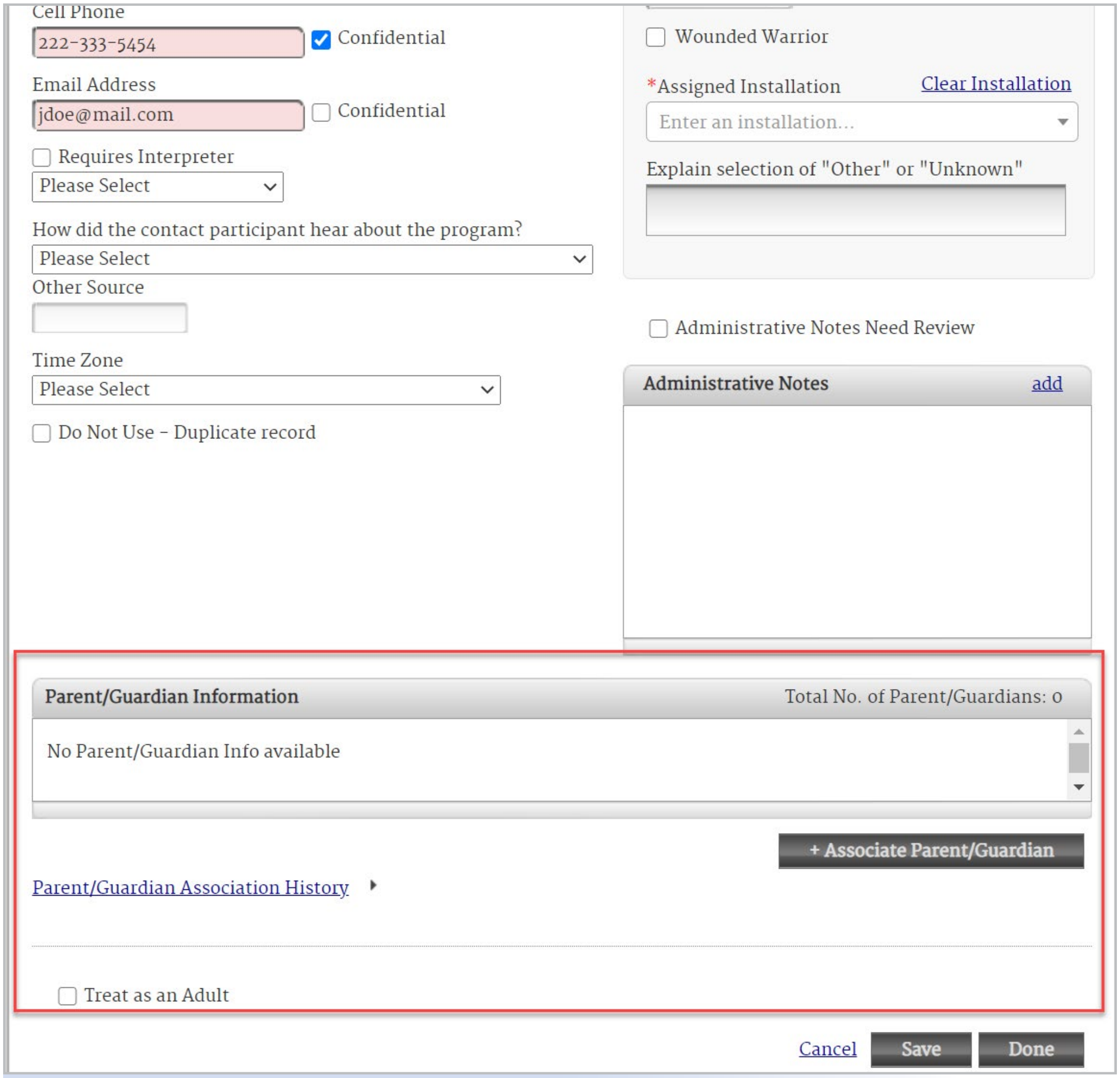


Figure 31

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.

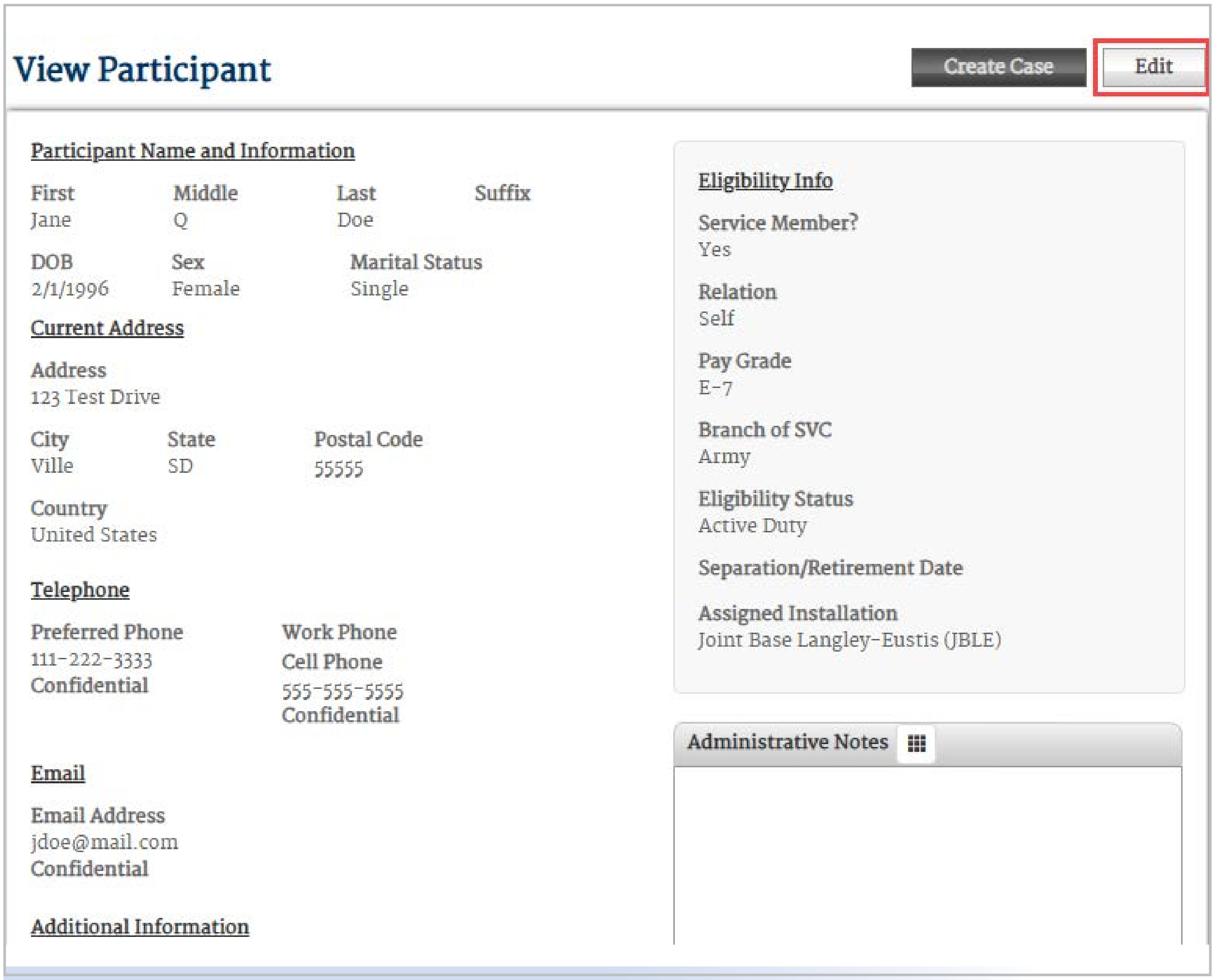


Figure 32

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

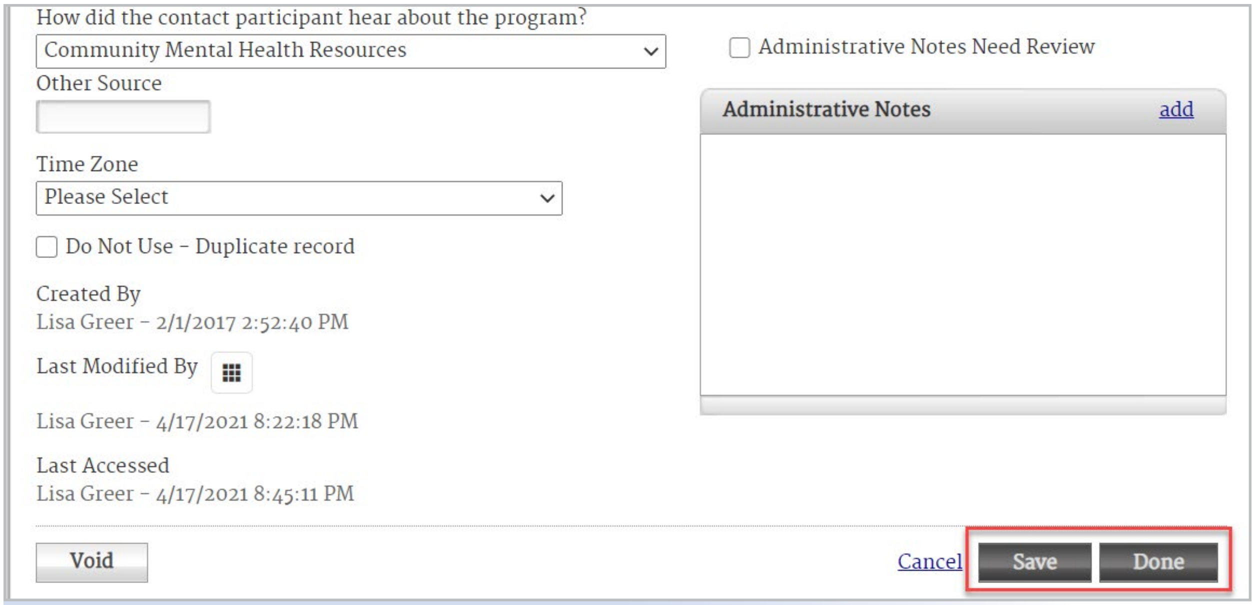


Figure 33

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.

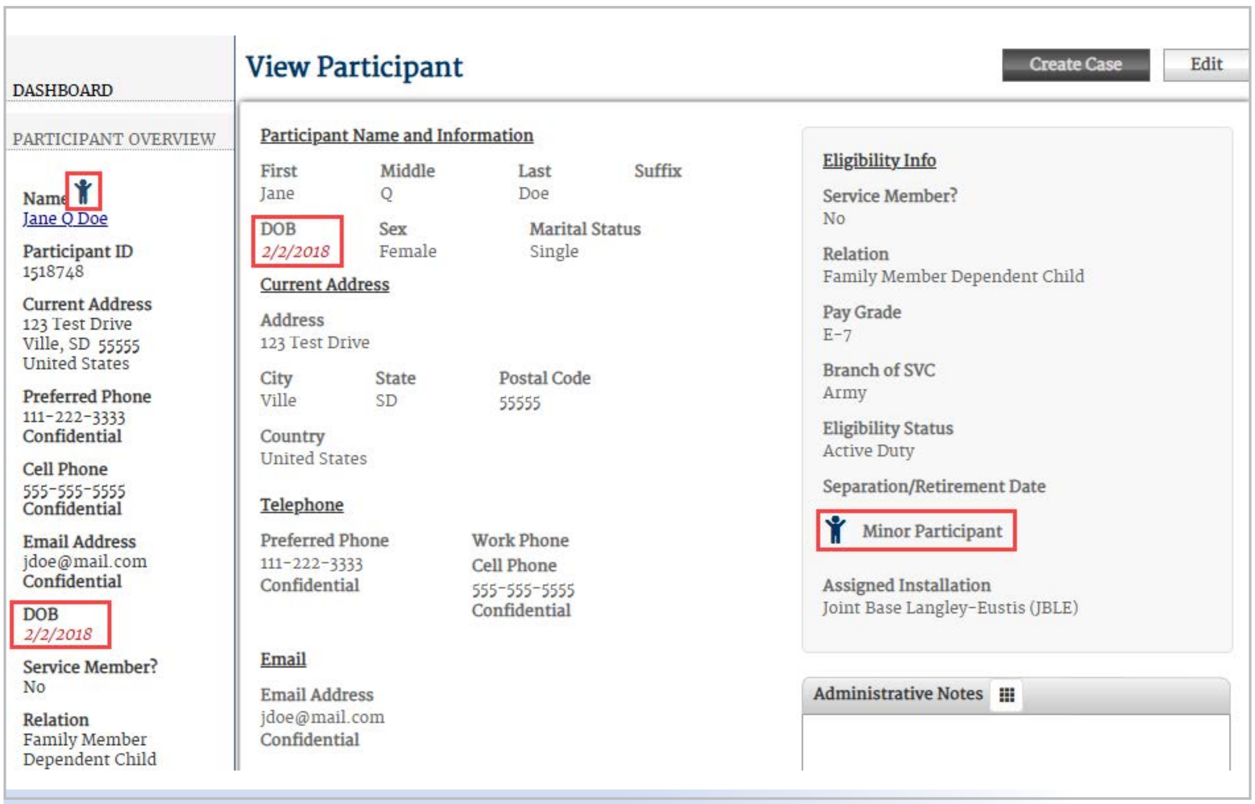


Figure 34

Scrolling down, you will find the addition of a Parent/Guardian section.

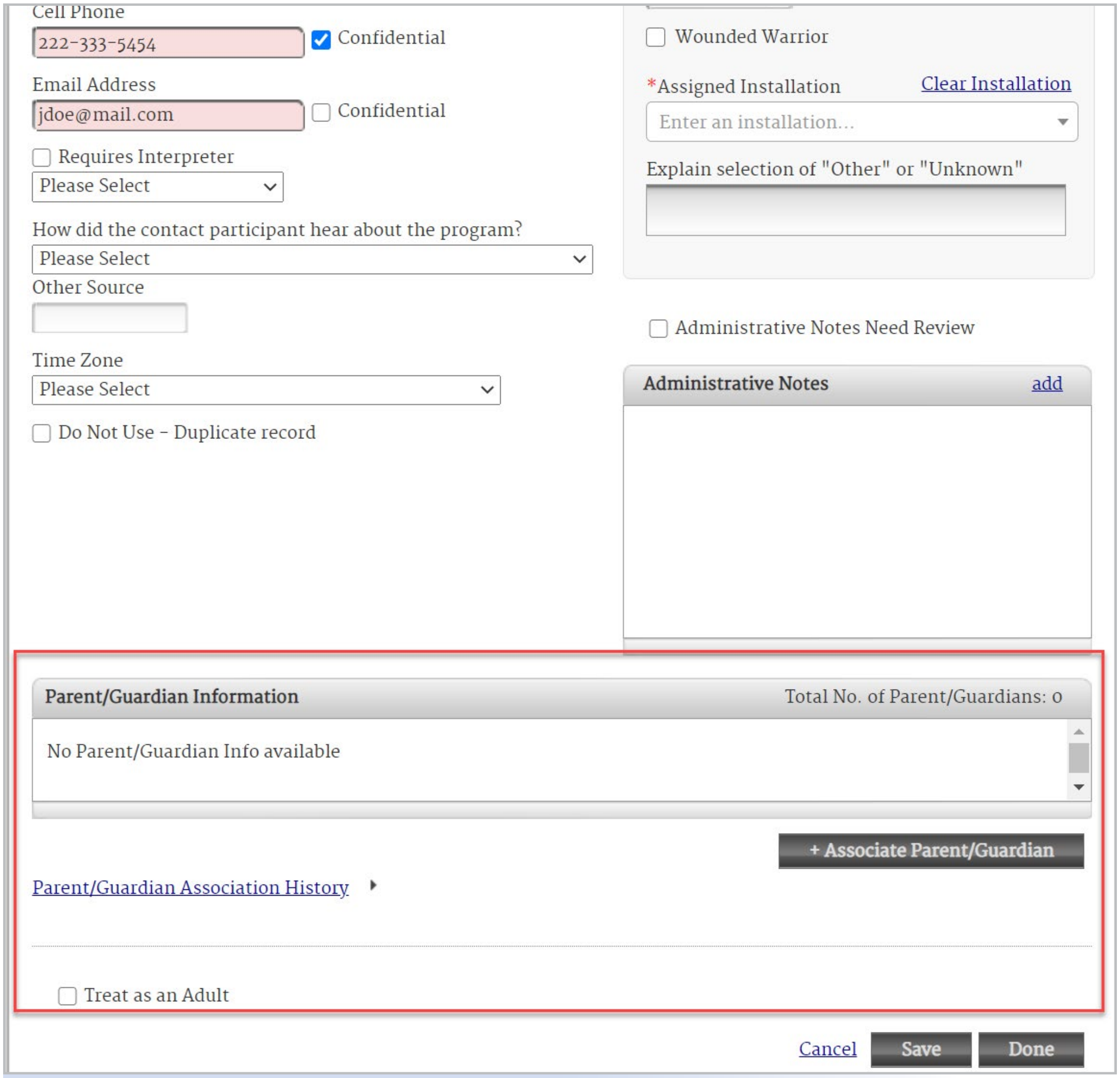


Figure 35

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.

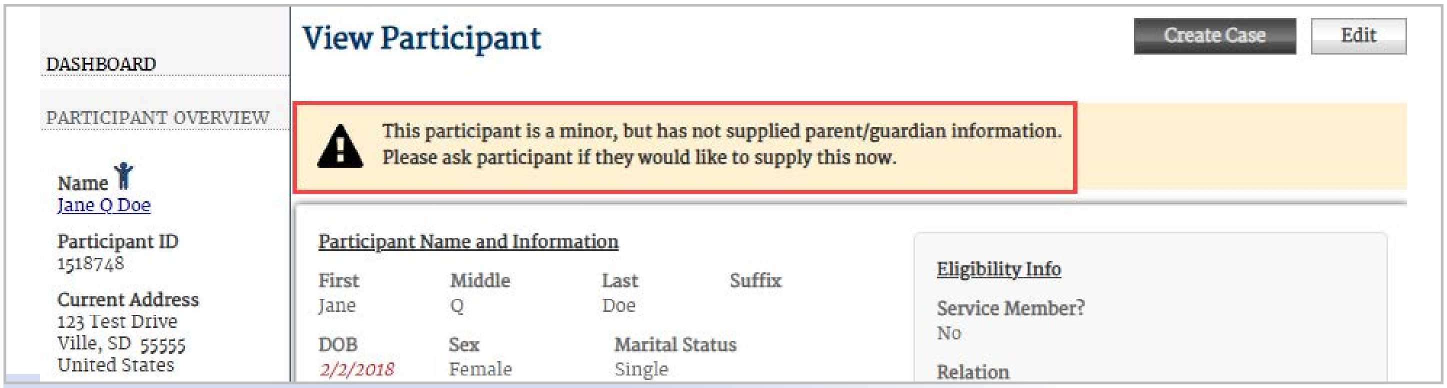


Figure 36

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.

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.

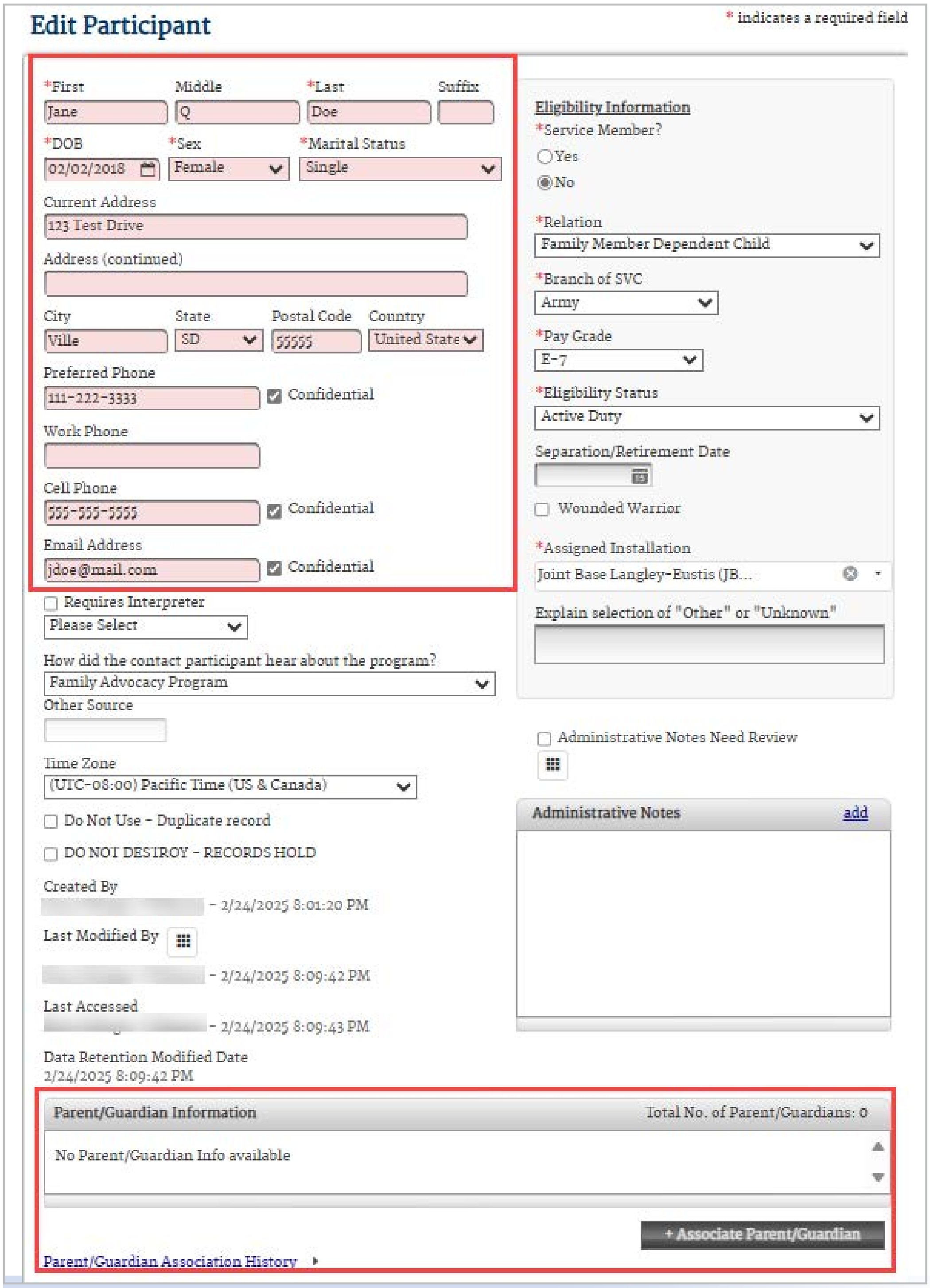


Figure 38

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."

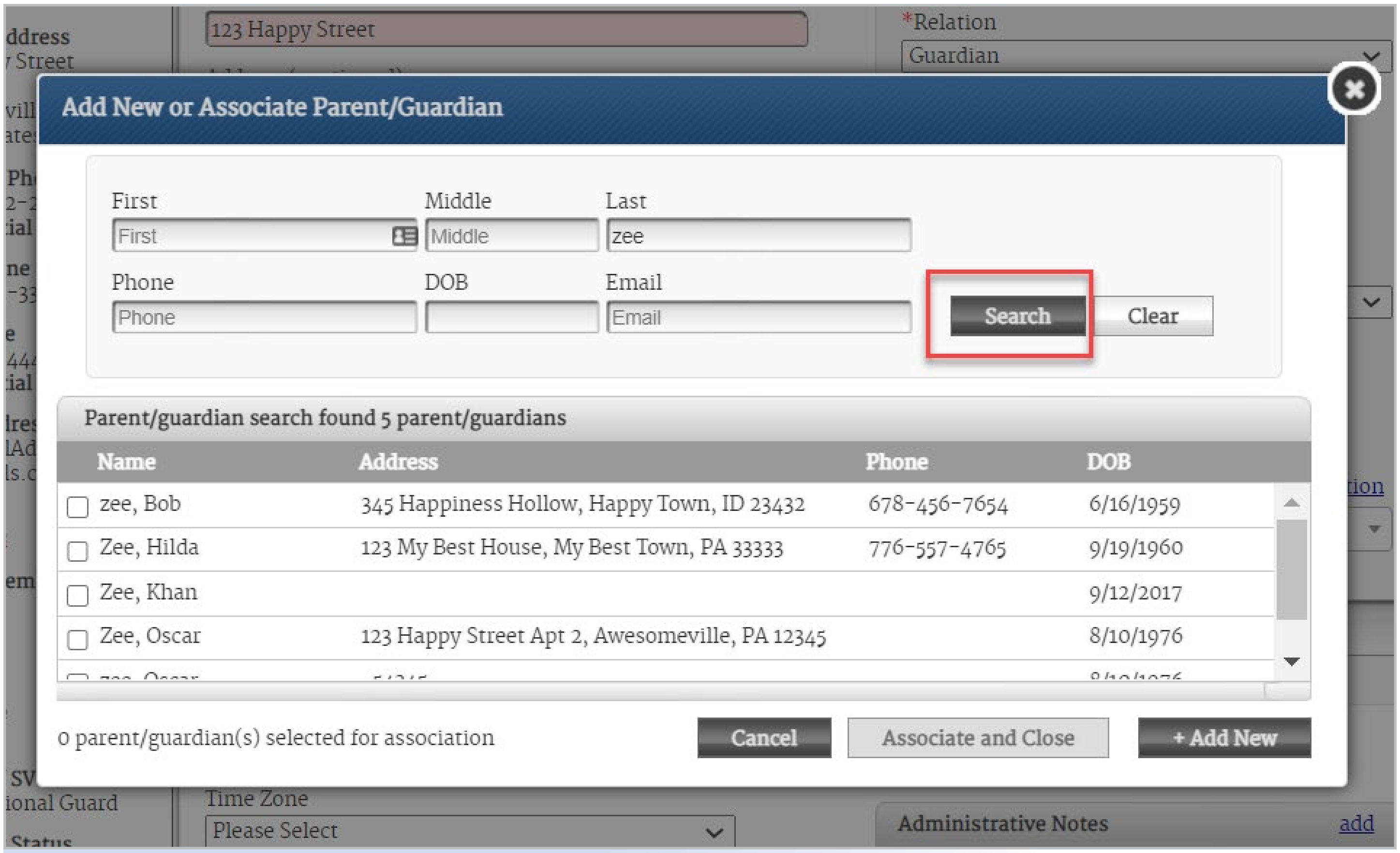


Figure 39

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.

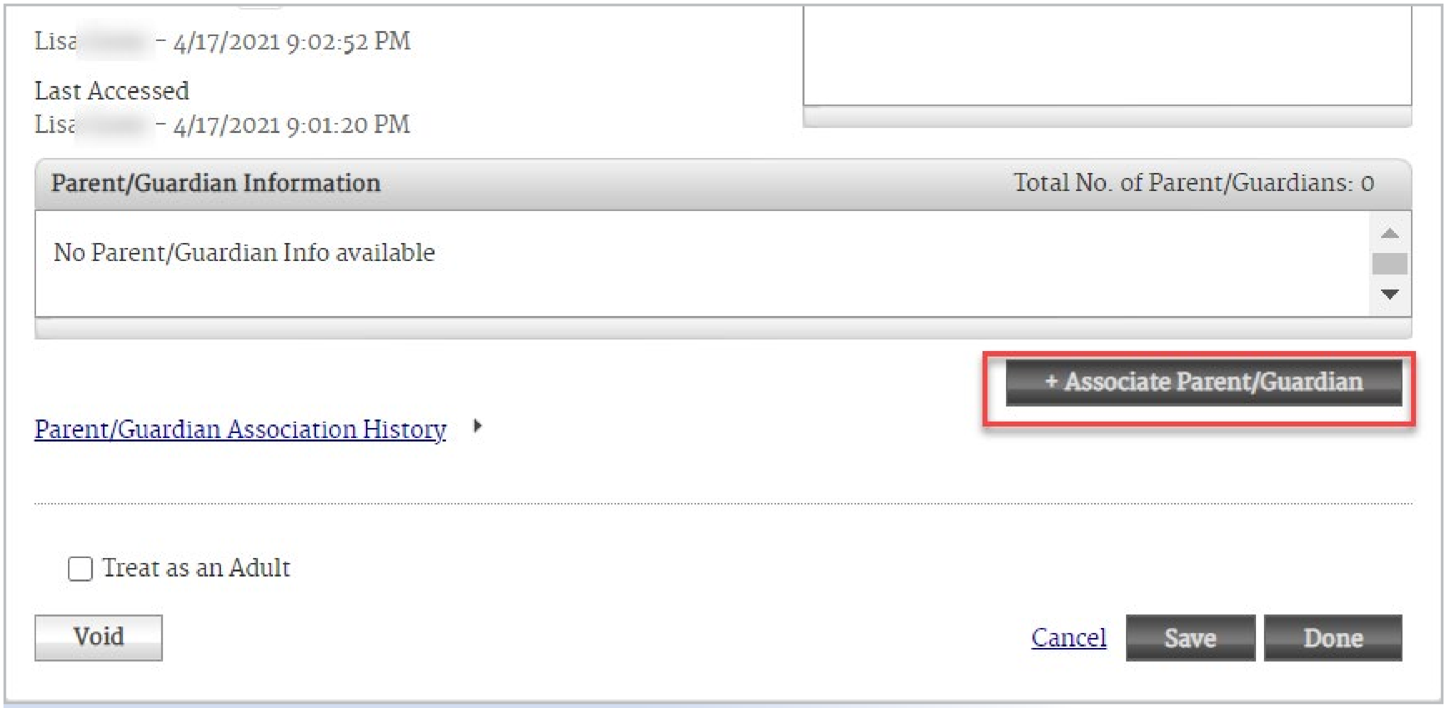


Figure 40

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.

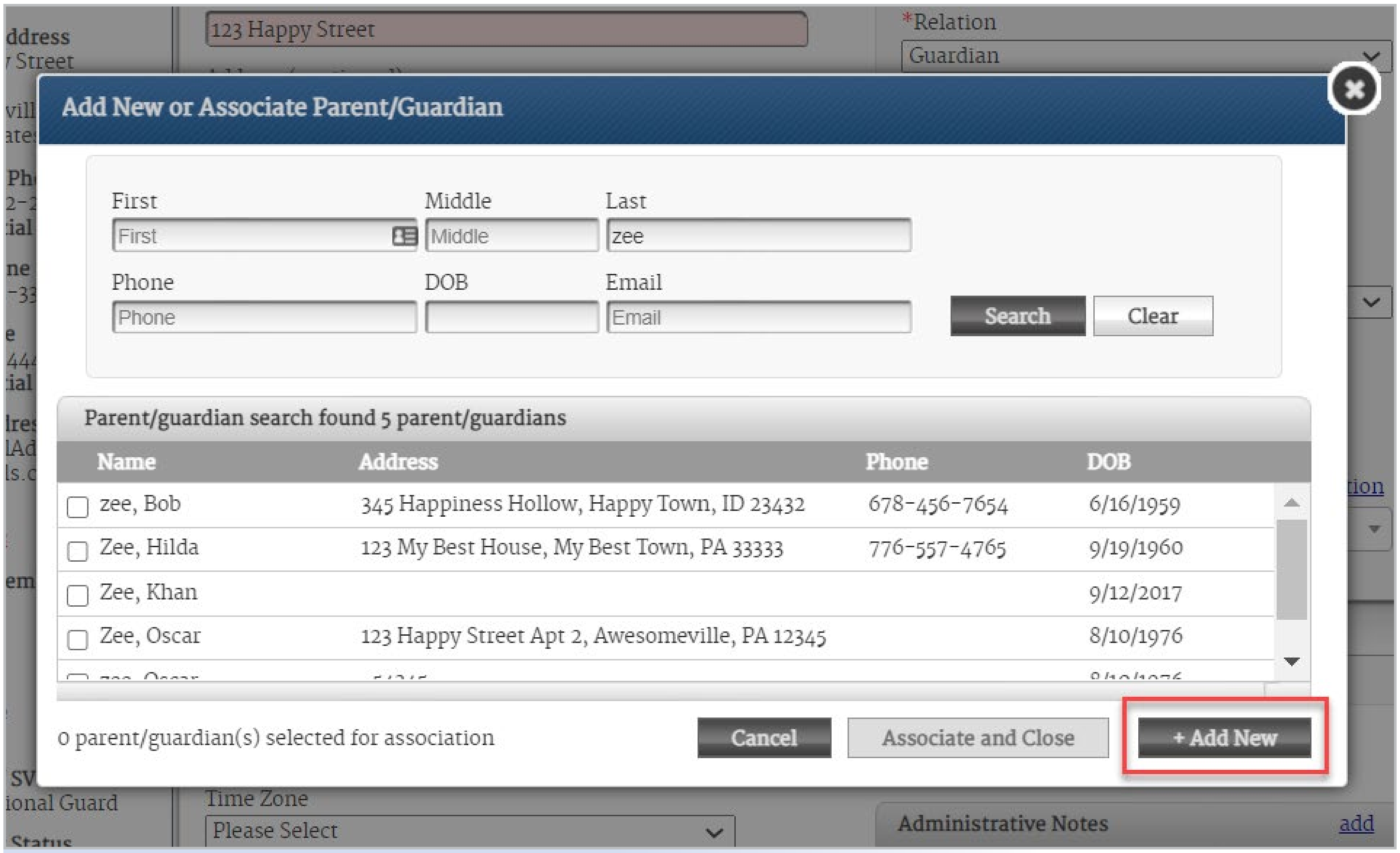


Figure 41

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.

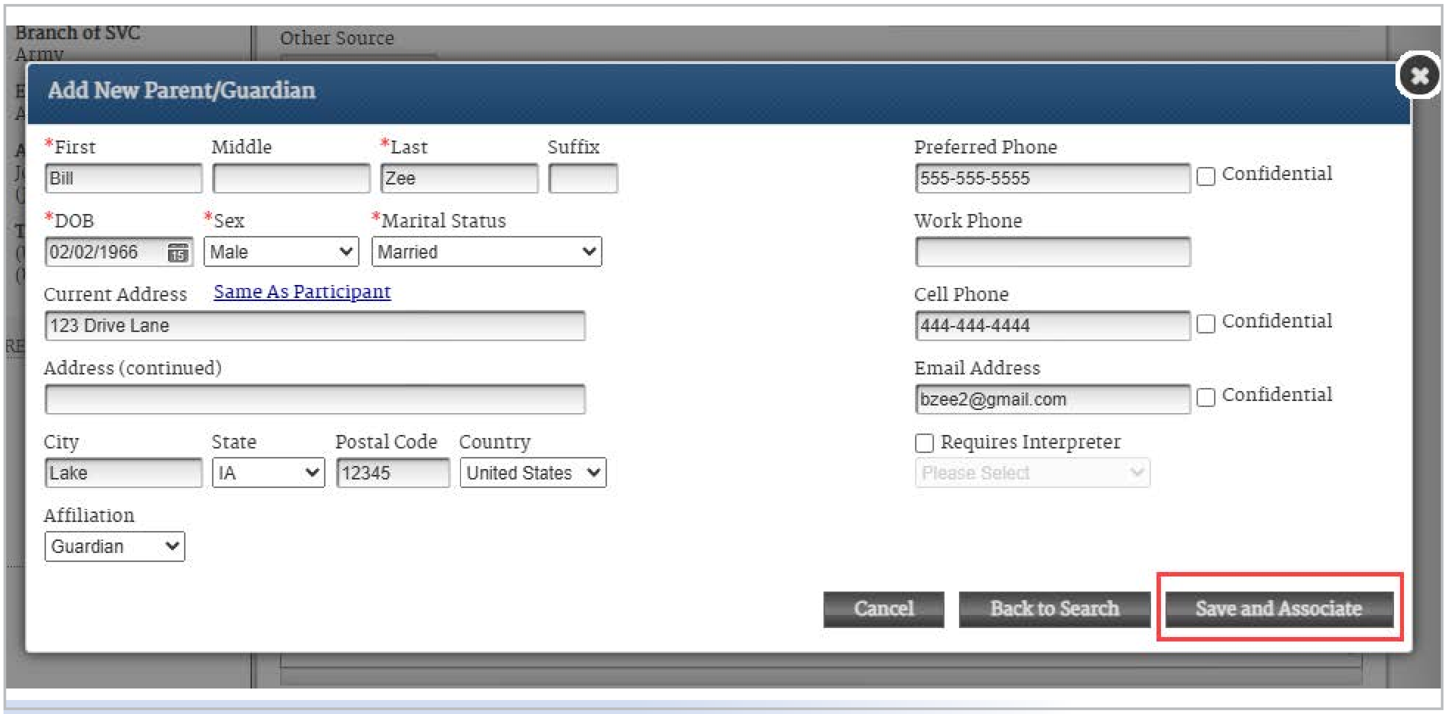


Figure 42

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.

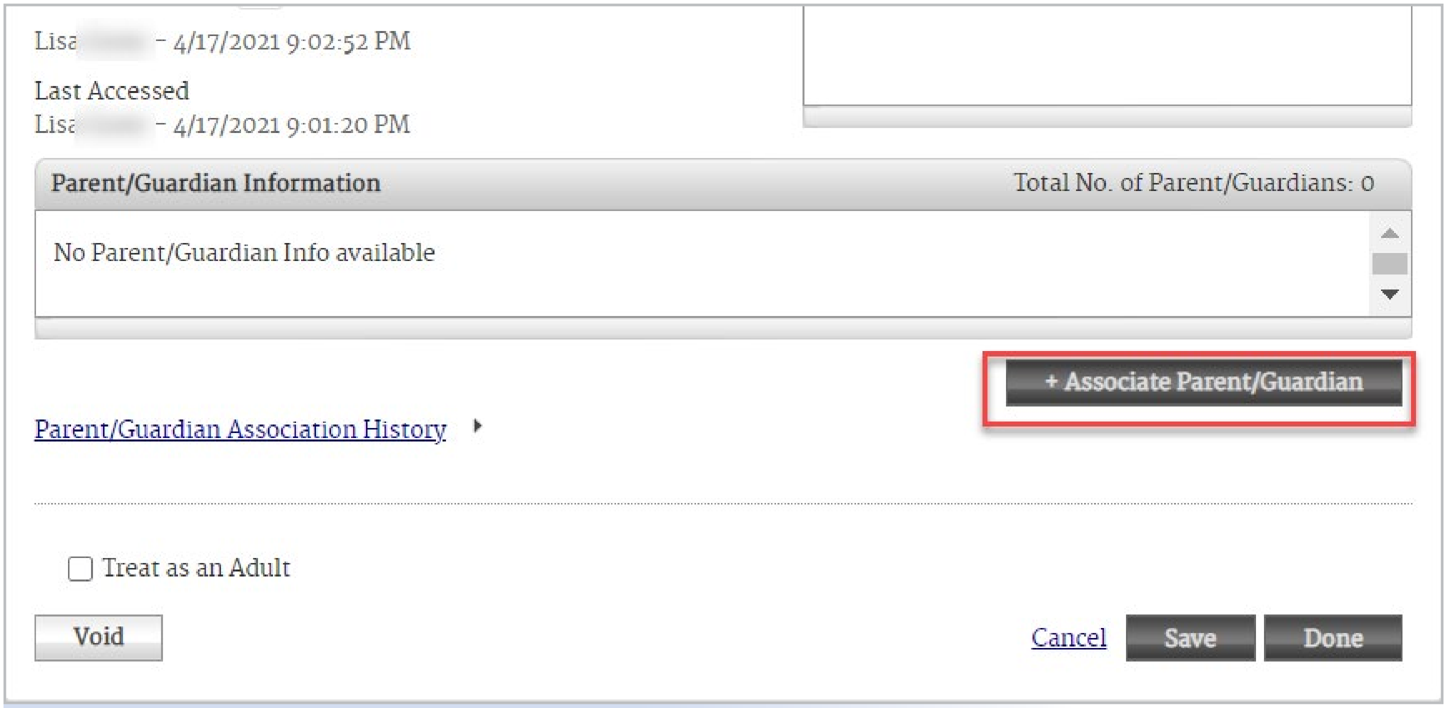


Figure 43

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.

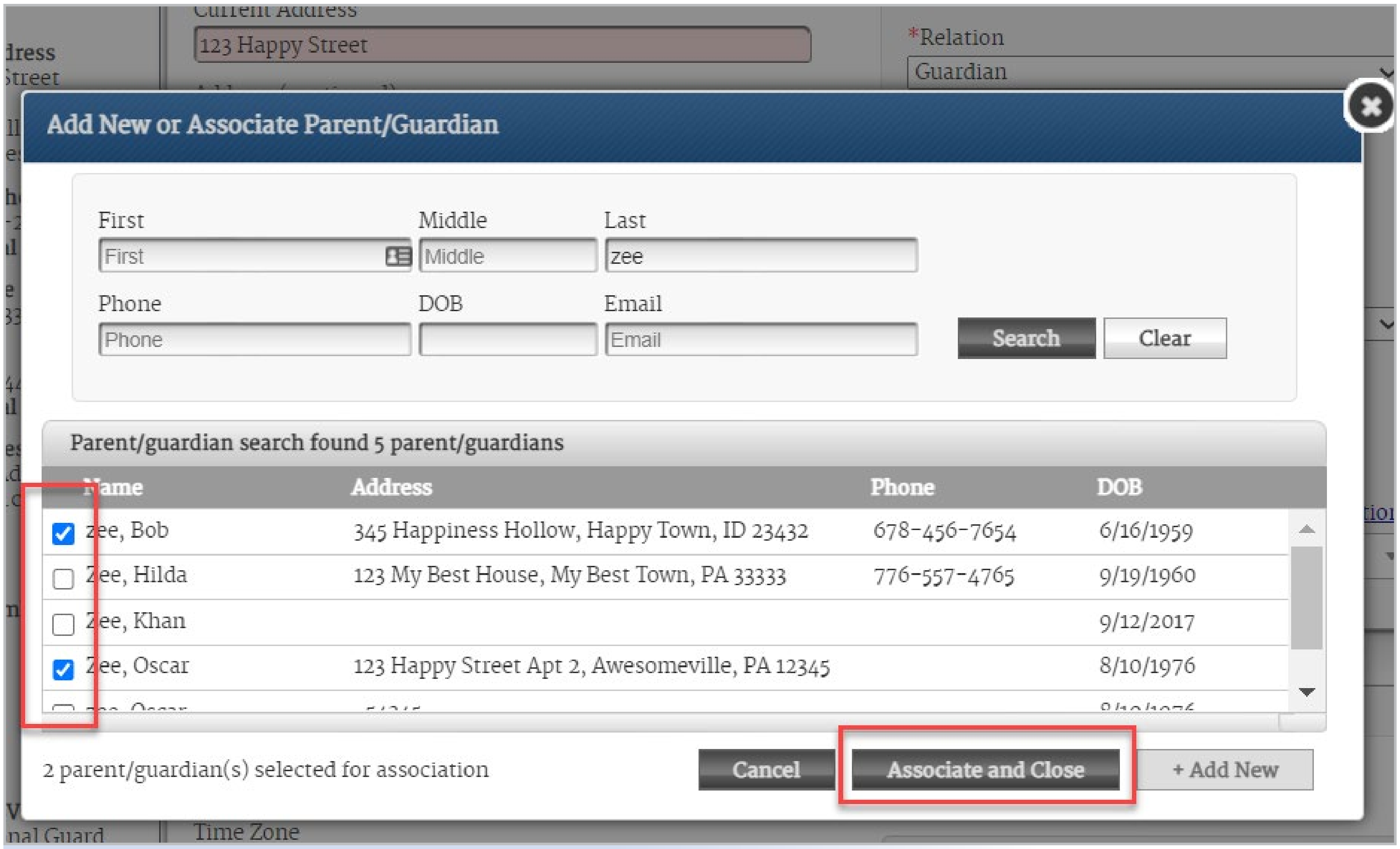


Figure 44

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.

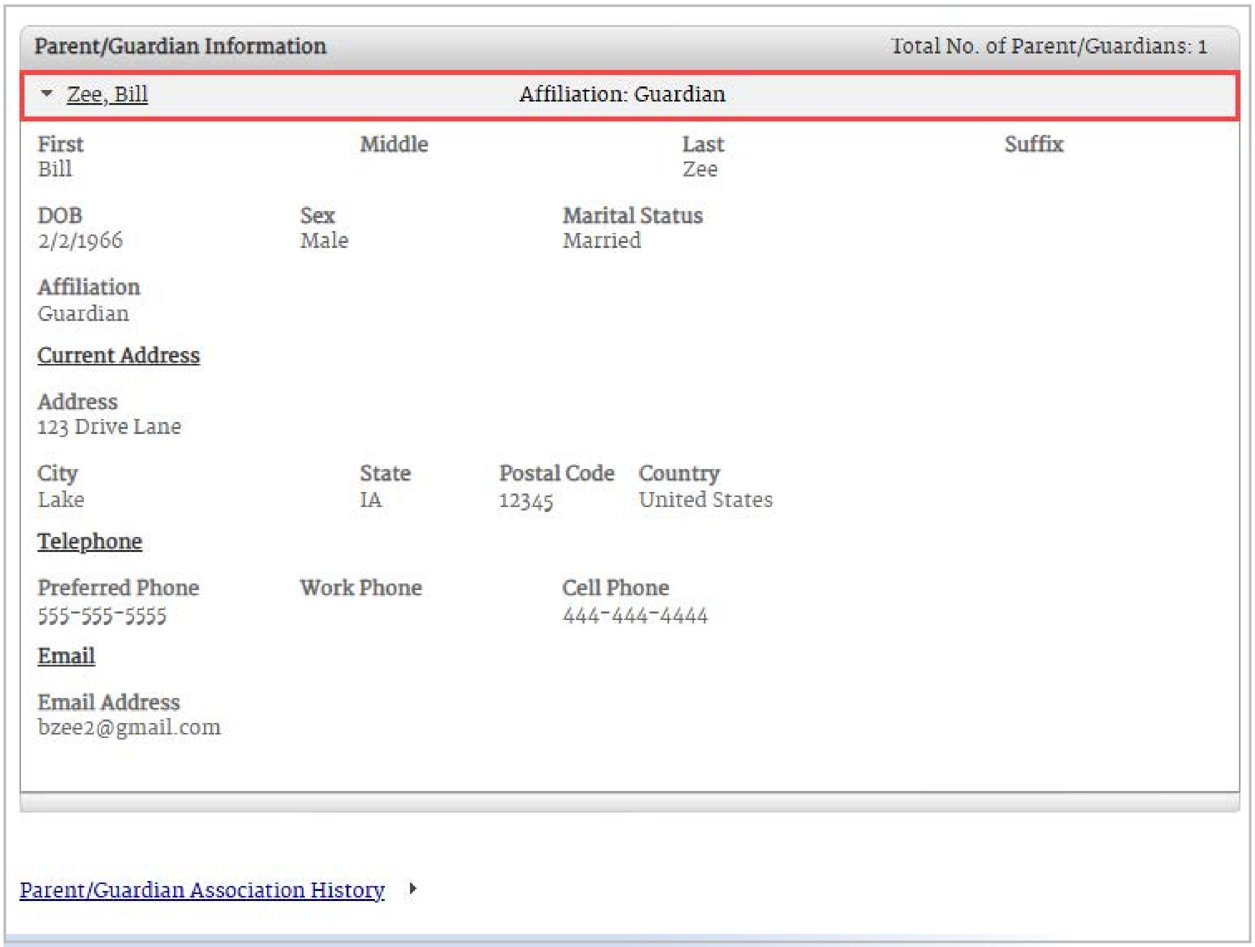


Figure 45

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.

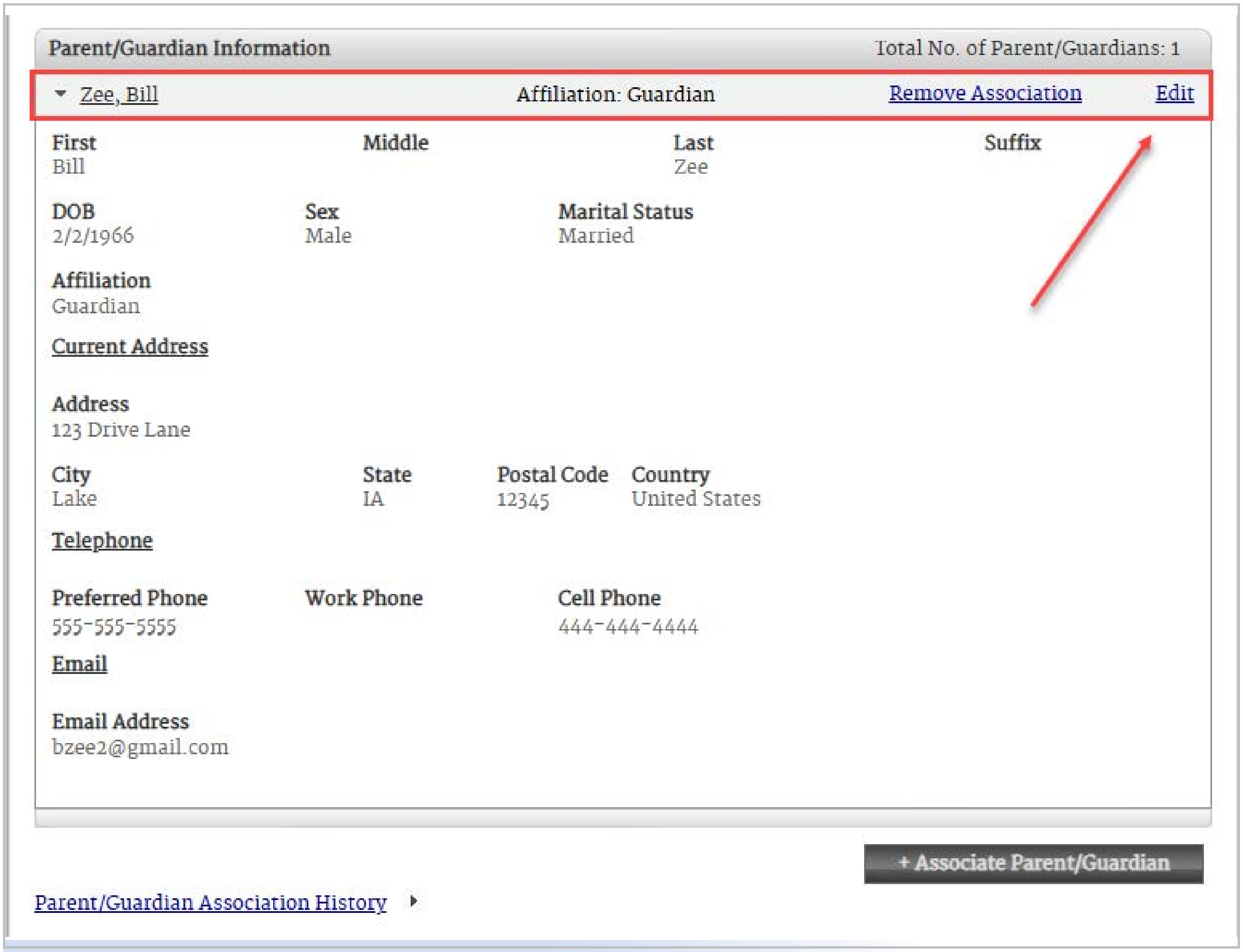


Figure 46

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.

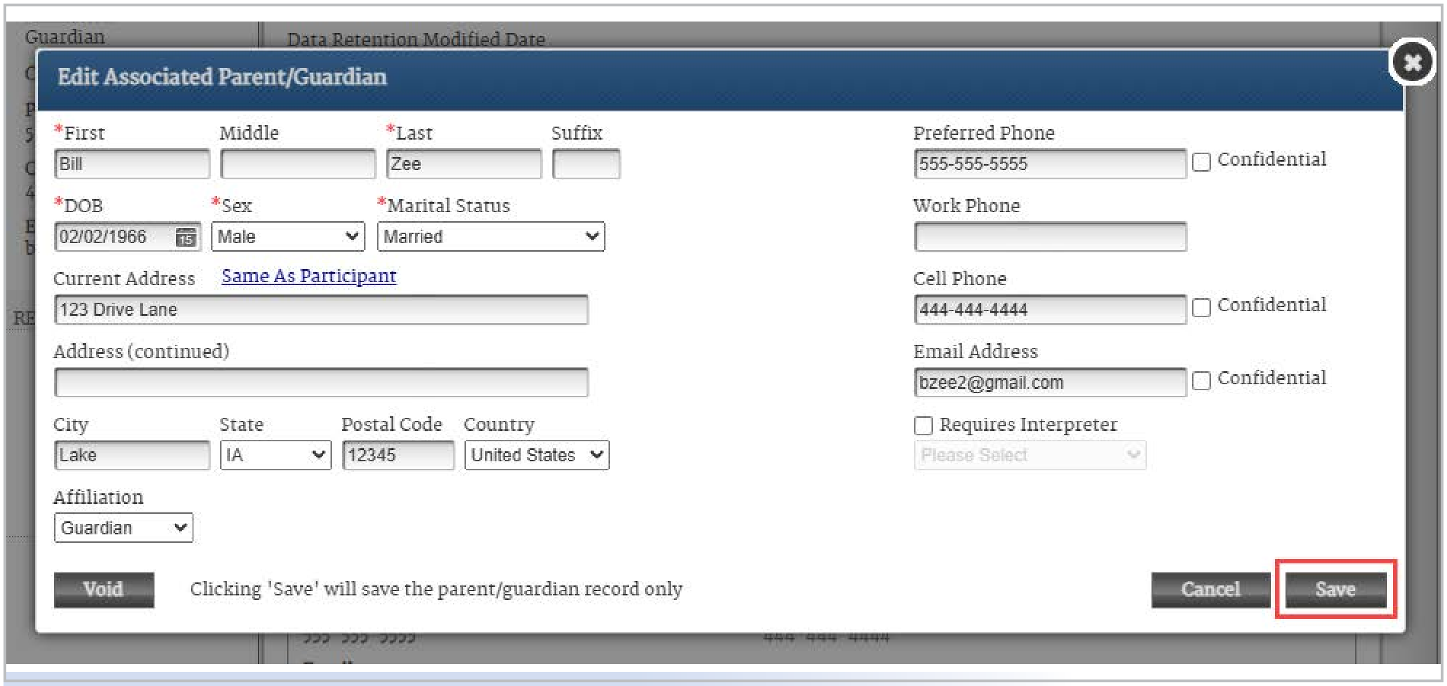


Figure 47

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.

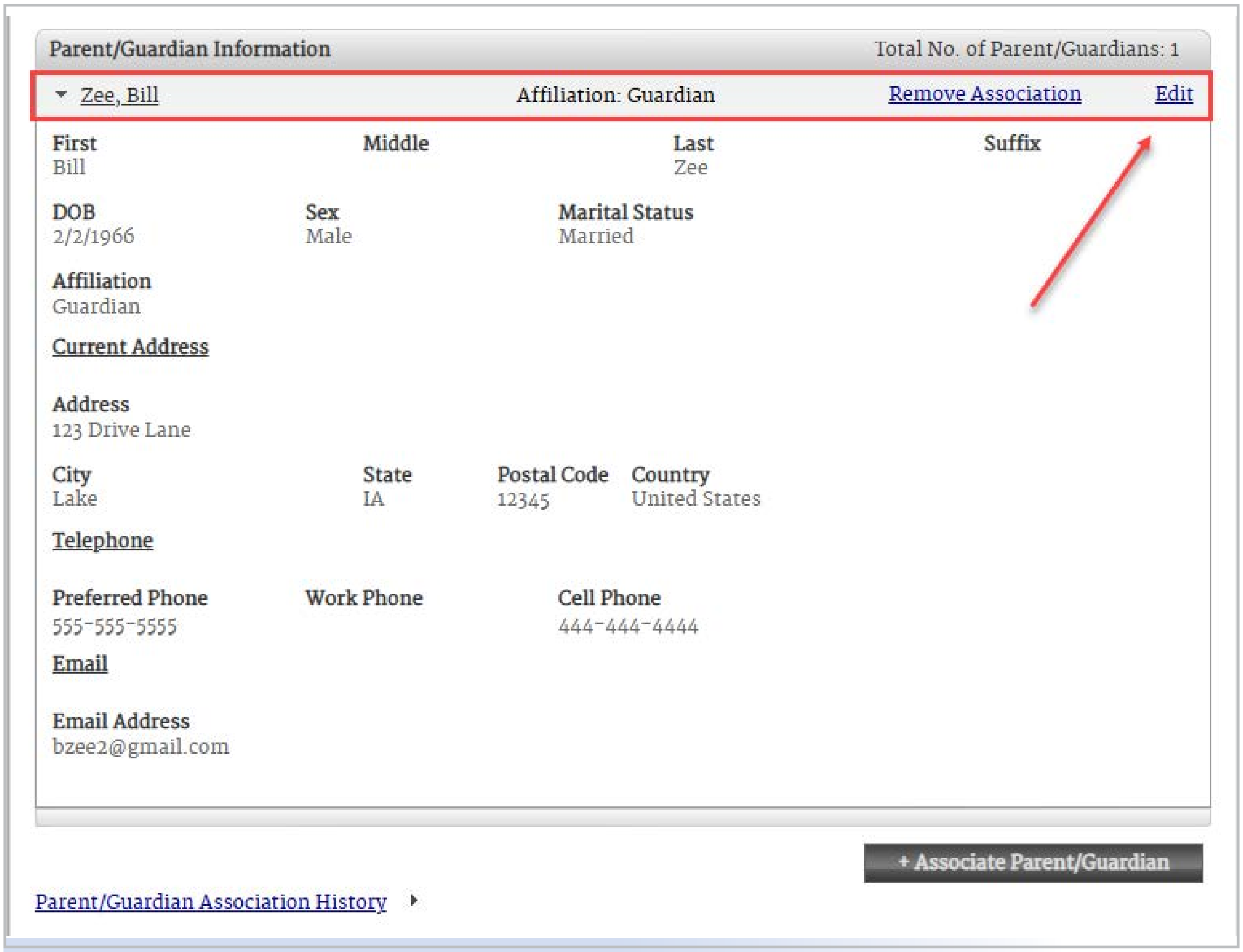


Figure 48

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.

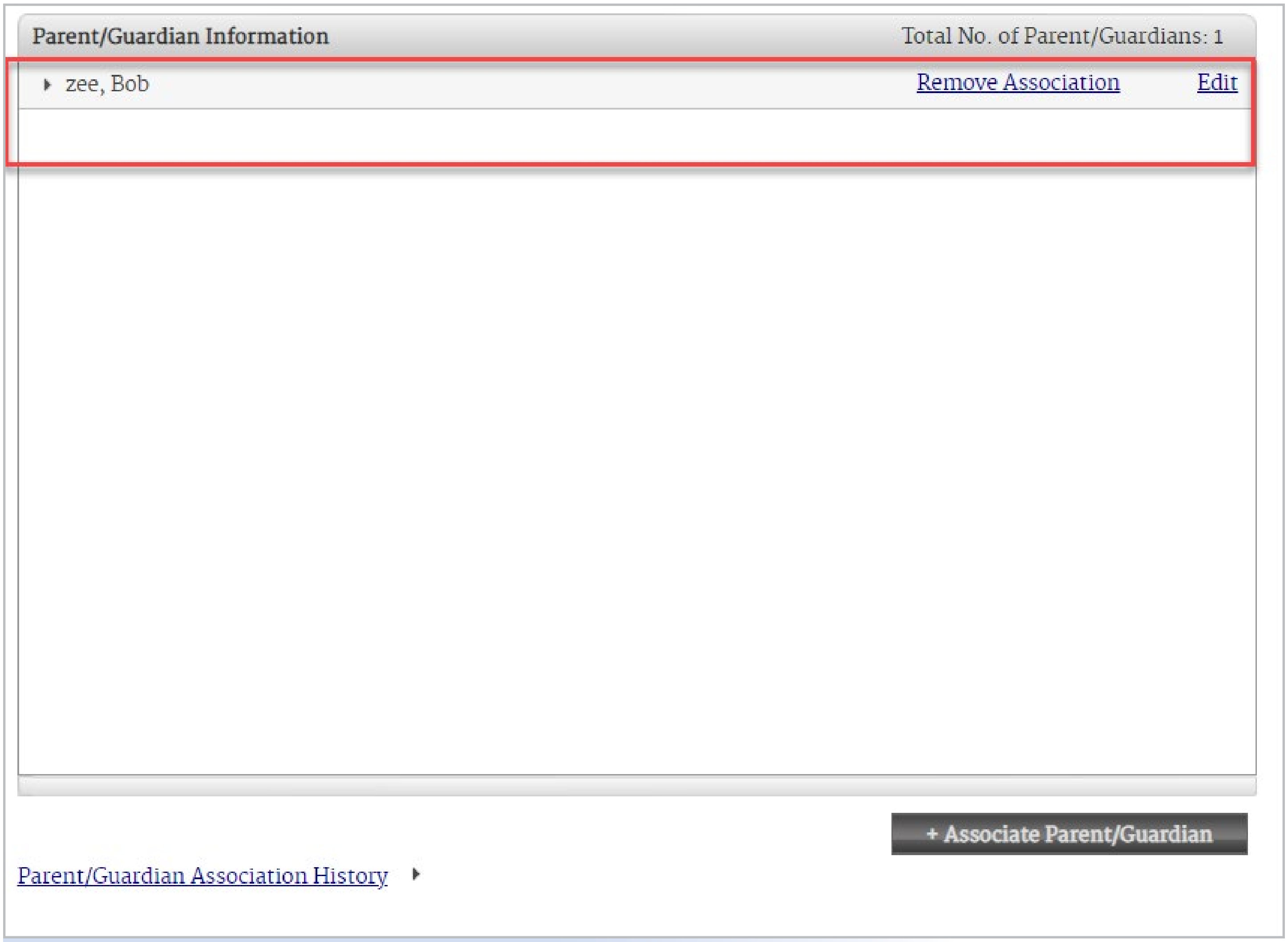


Figure 49

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.

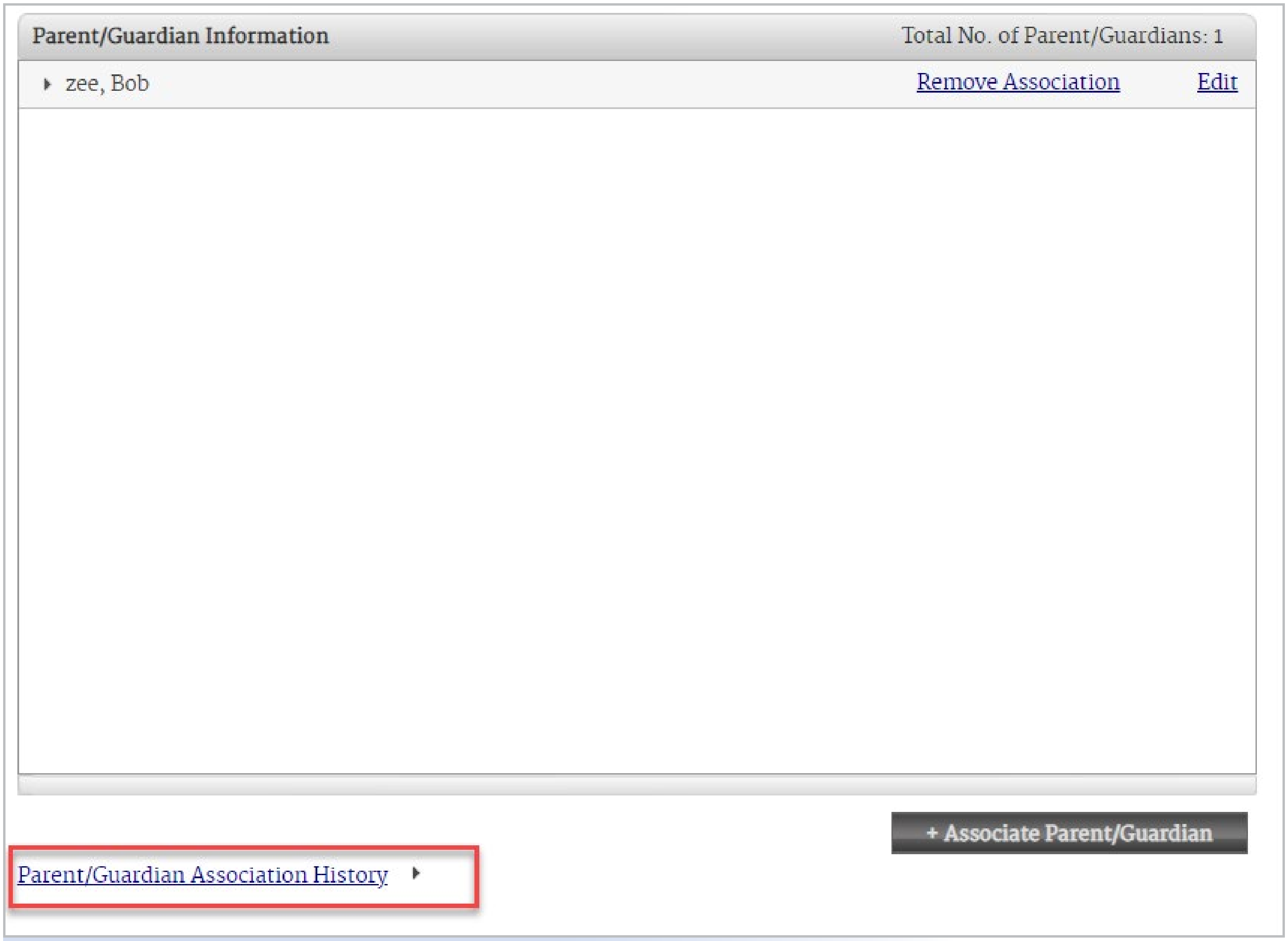
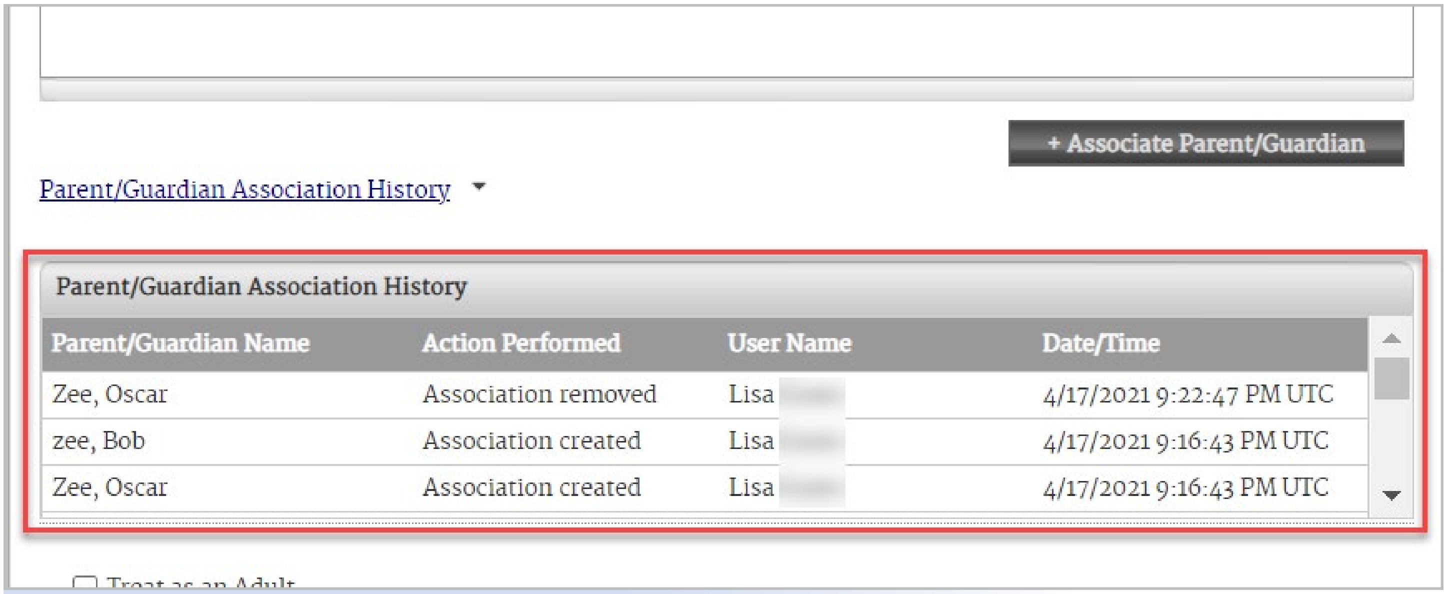


Figure 50

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



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

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.

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.

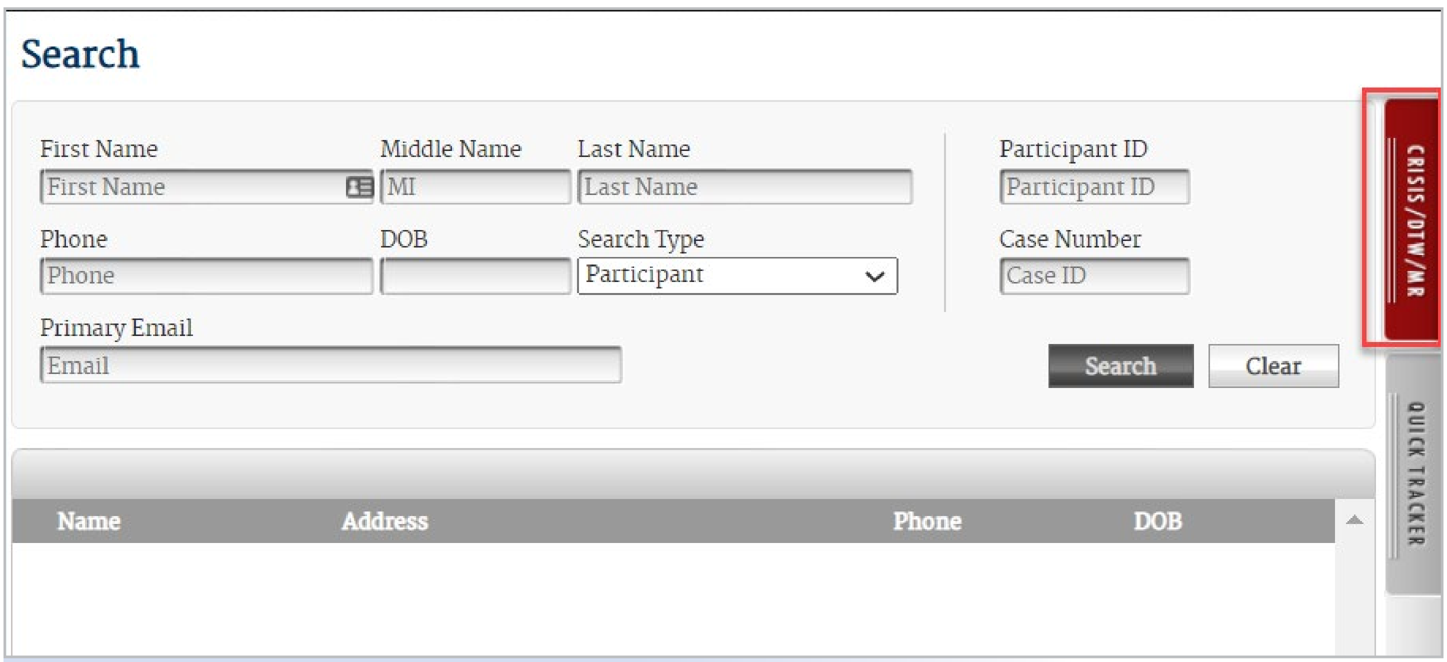


Figure 53

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.

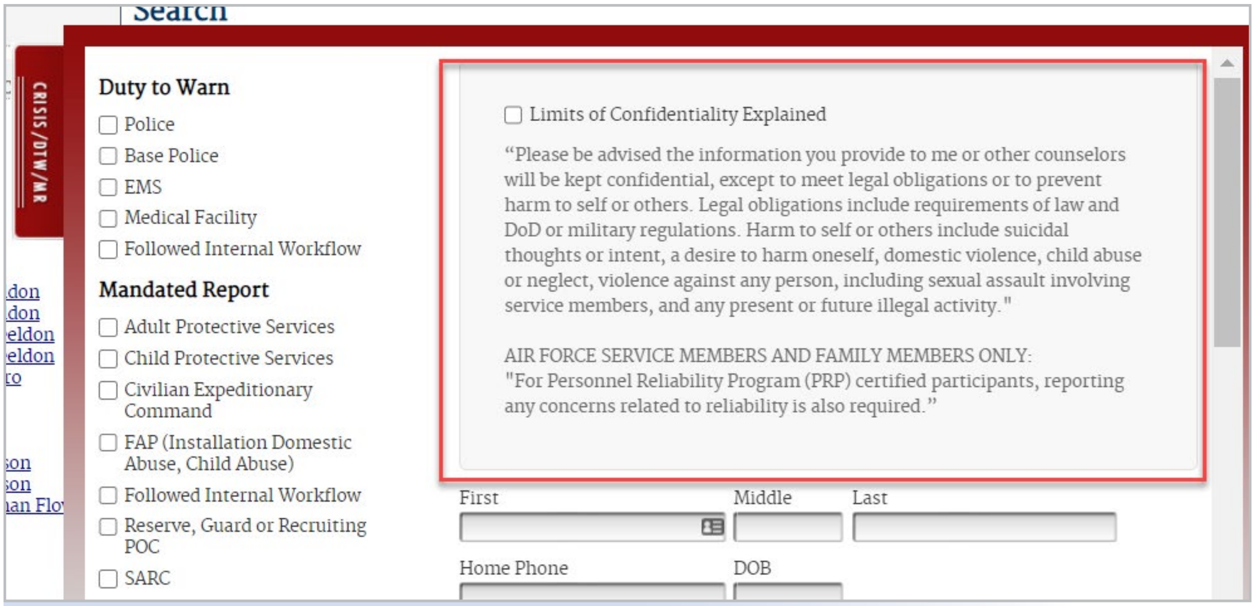


Figure 54

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

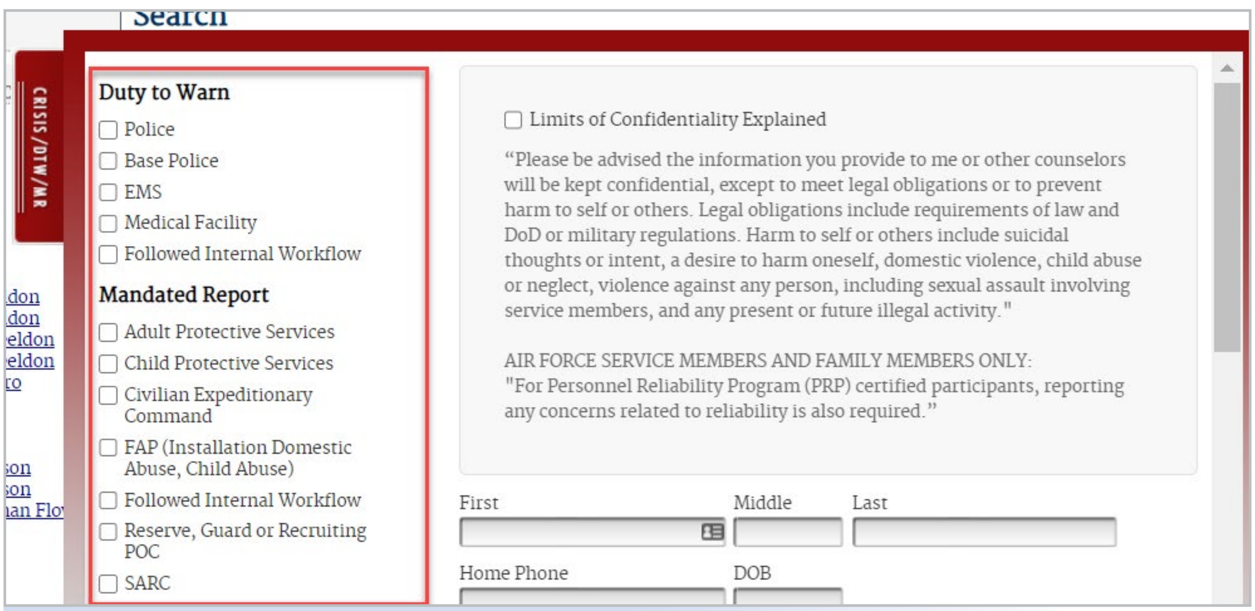


Figure 55

You will now need to decide if you will attach a Participant to the Crisis case.

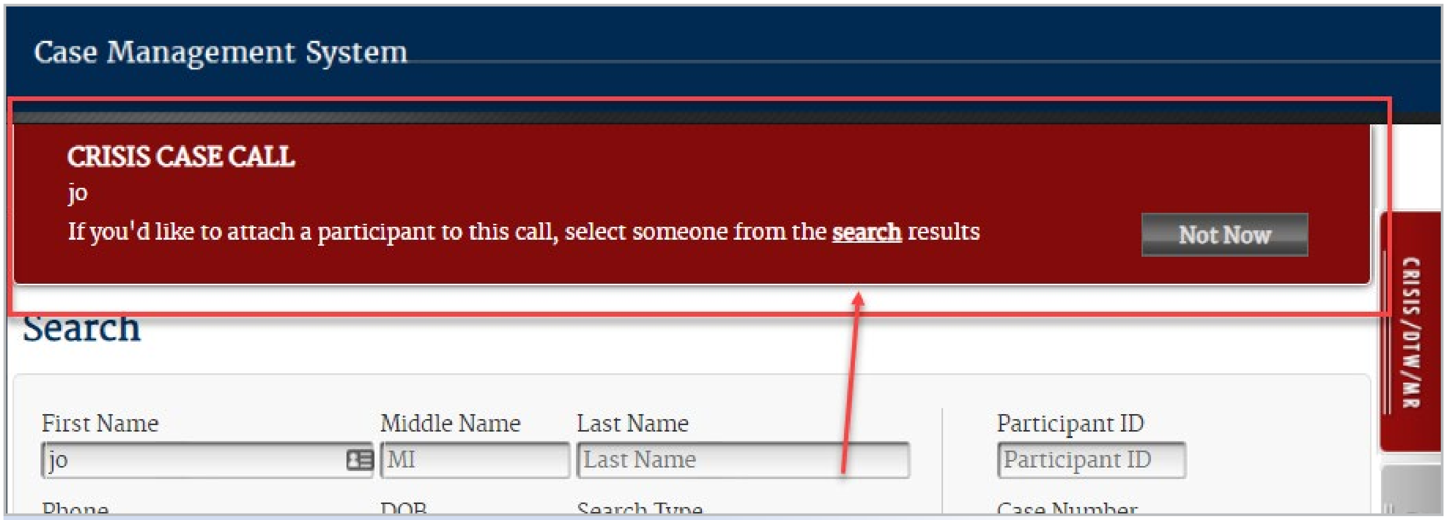


Figure 56

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.

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.

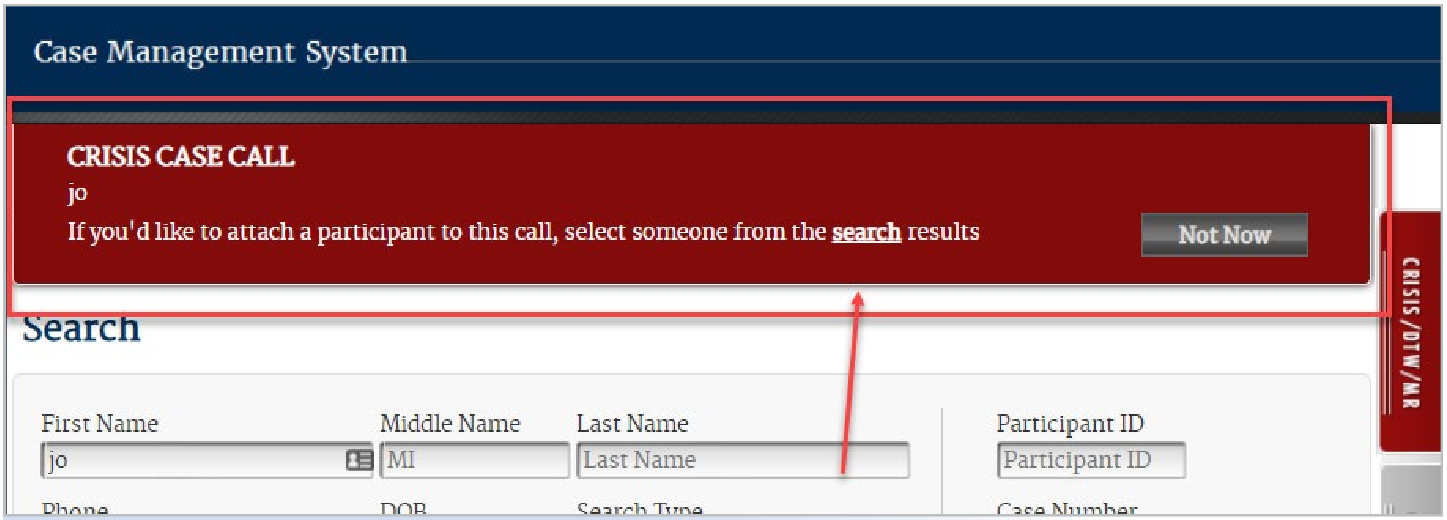


Figure 58

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.

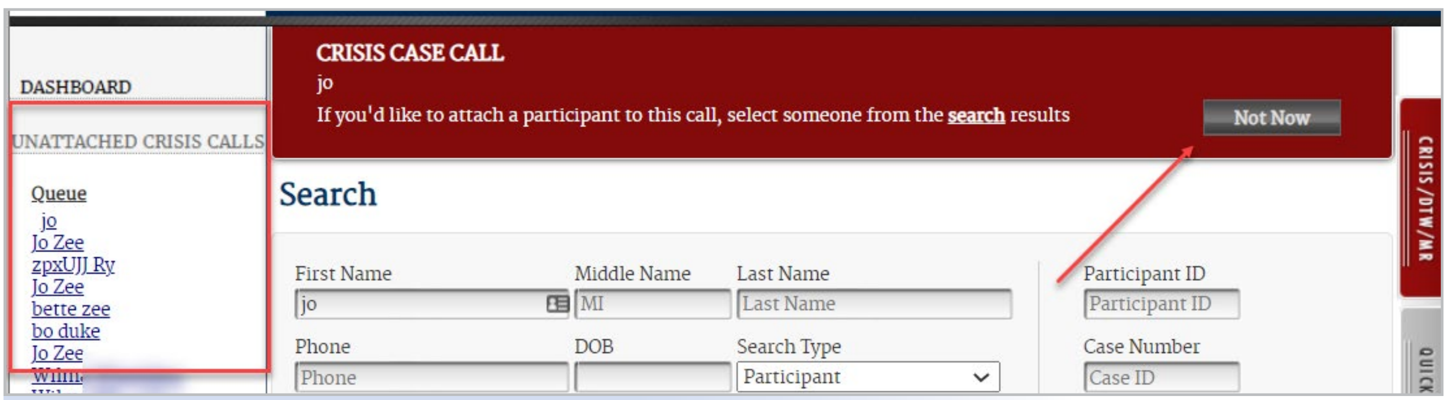


Figure 59

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.

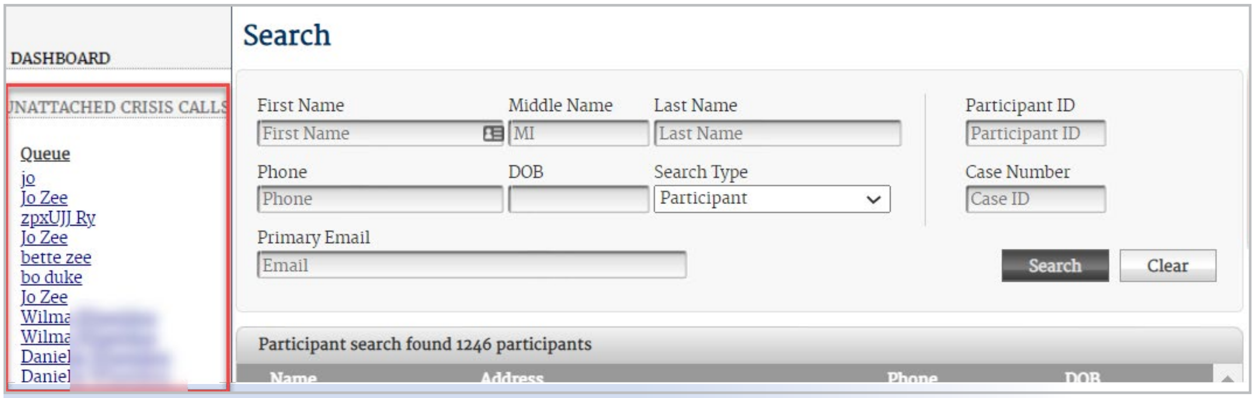
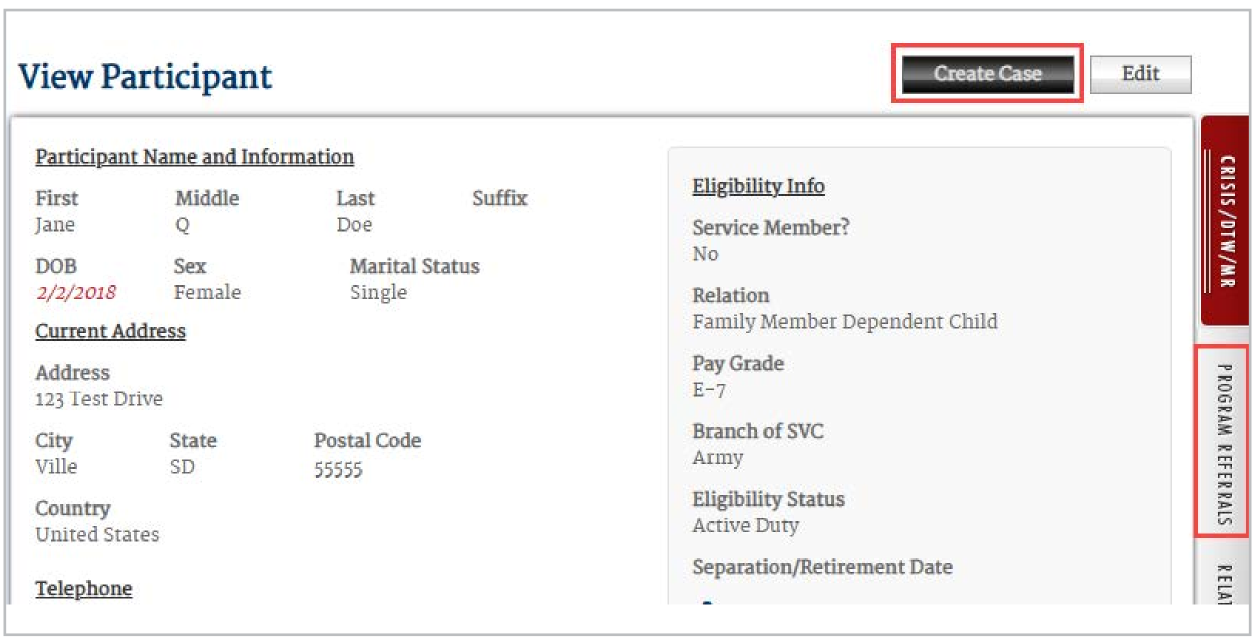


Figure 60

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.



Select "Non-Medical."

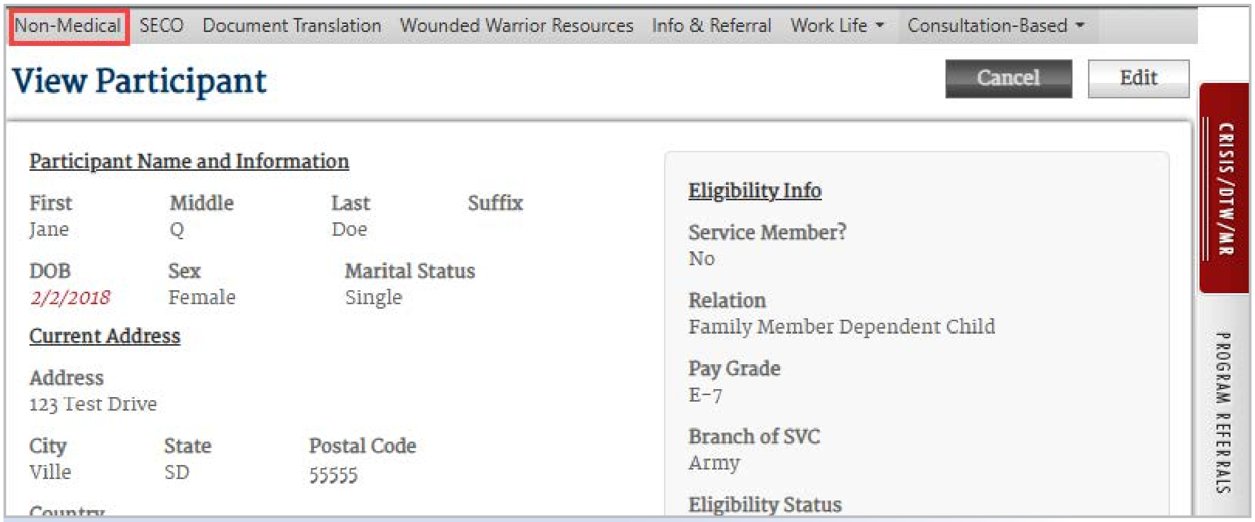


Figure 61

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

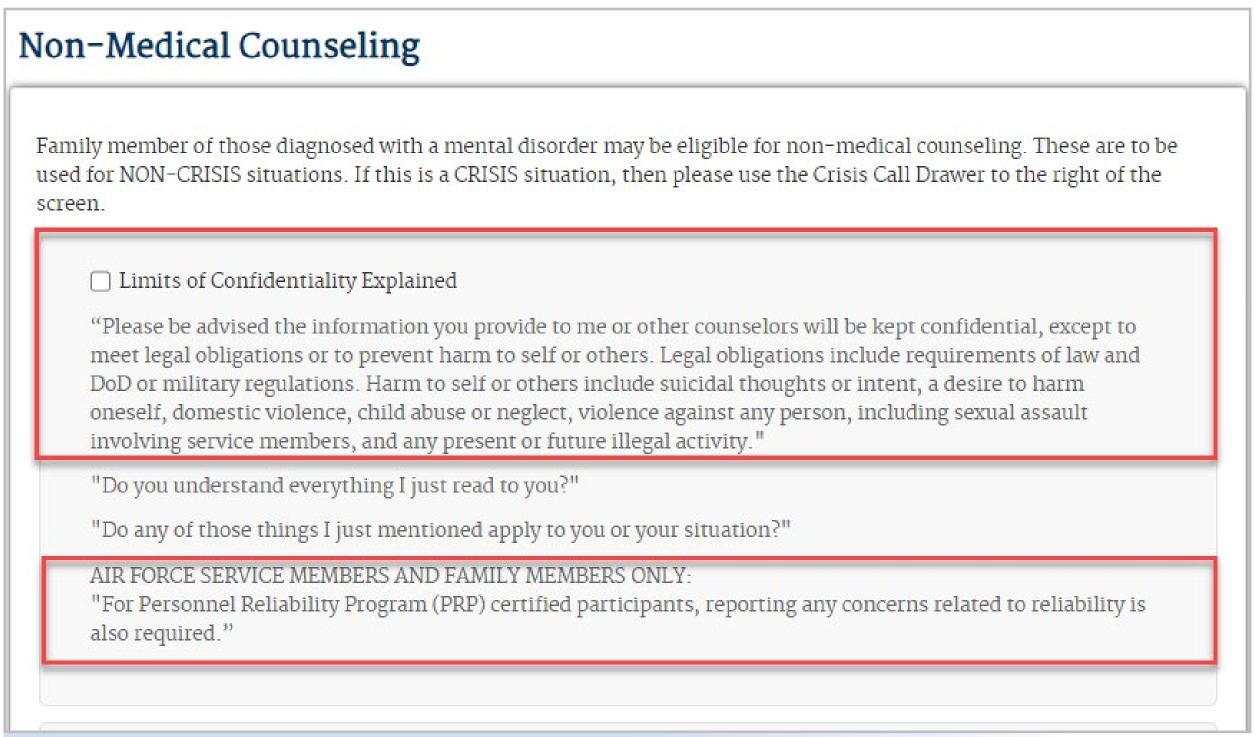


Figure 62

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).

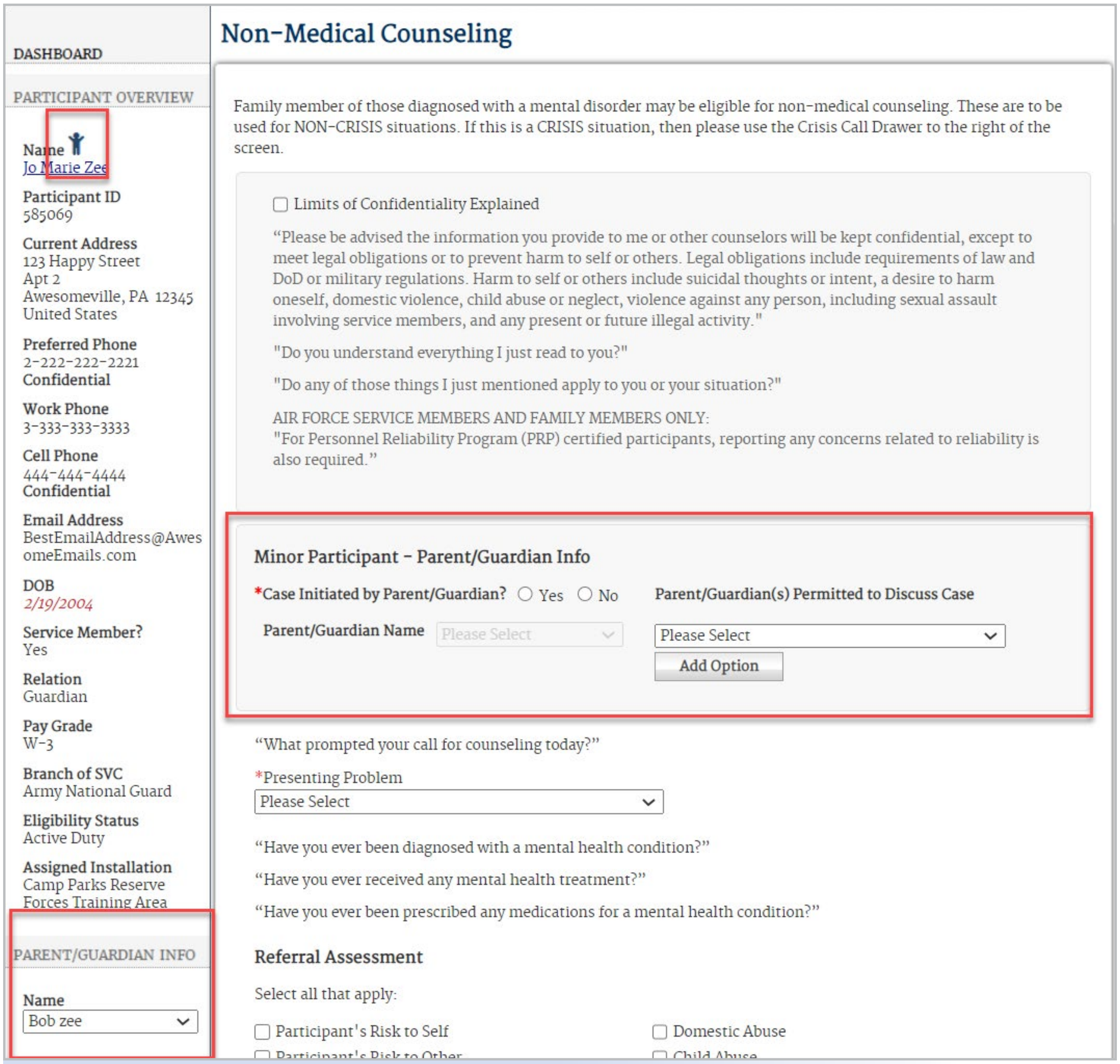


Figure 63

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."

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.

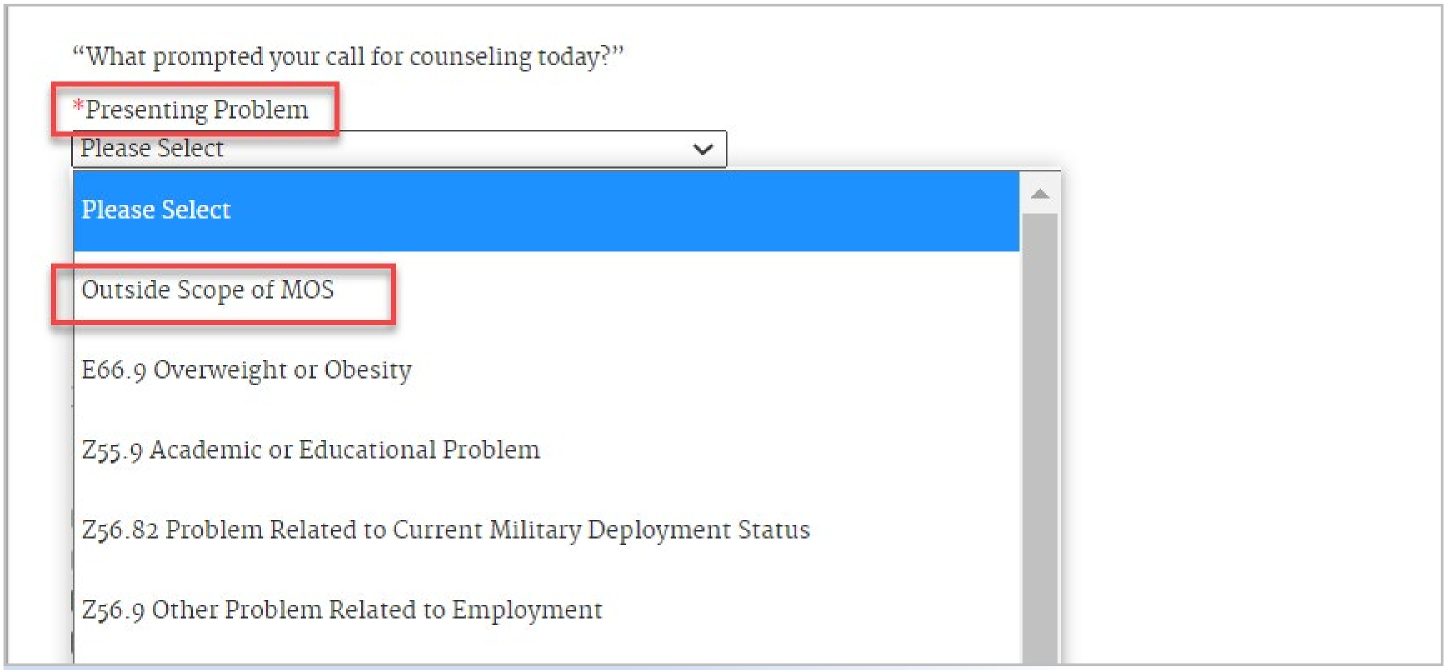


Figure 65

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.

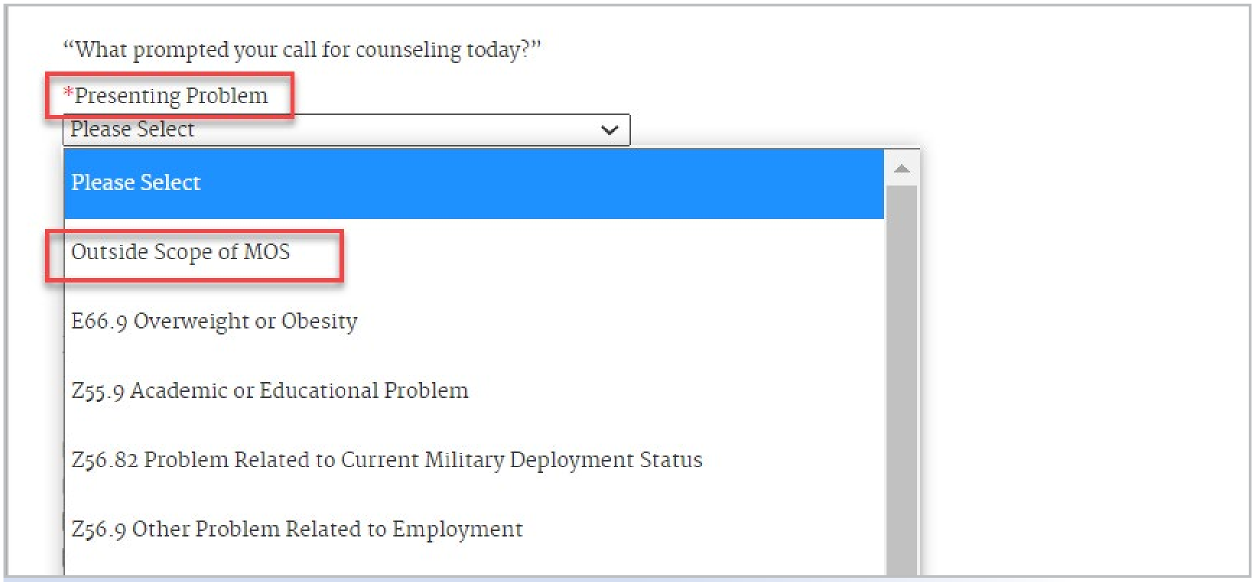


Figure 66

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.

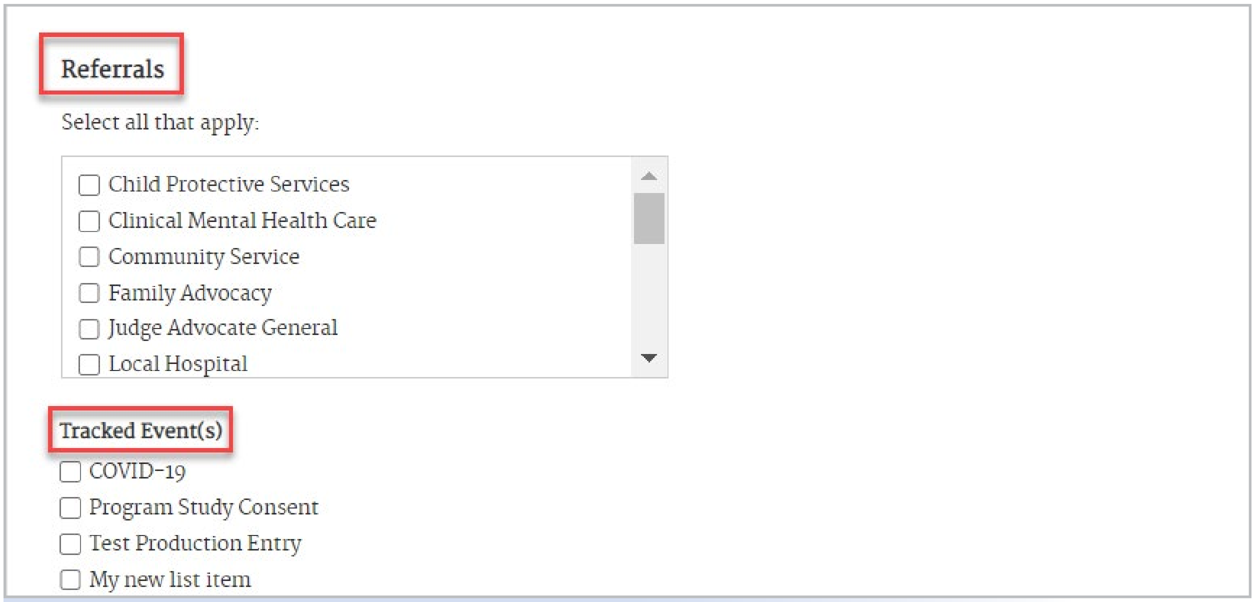


Figure 67

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.

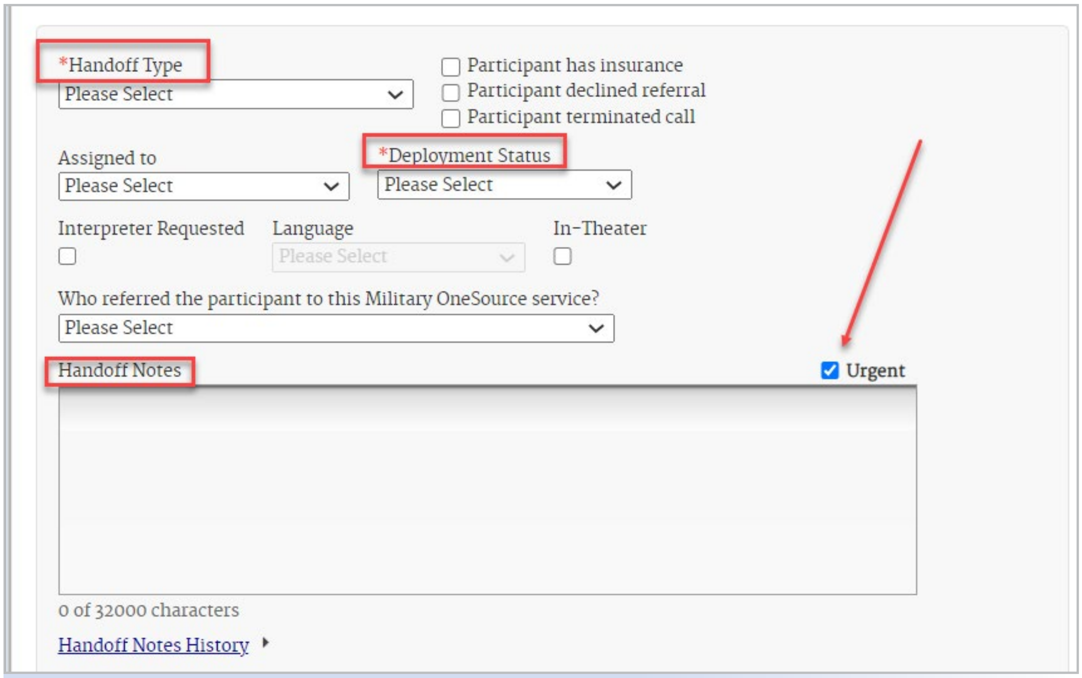


Figure 68

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

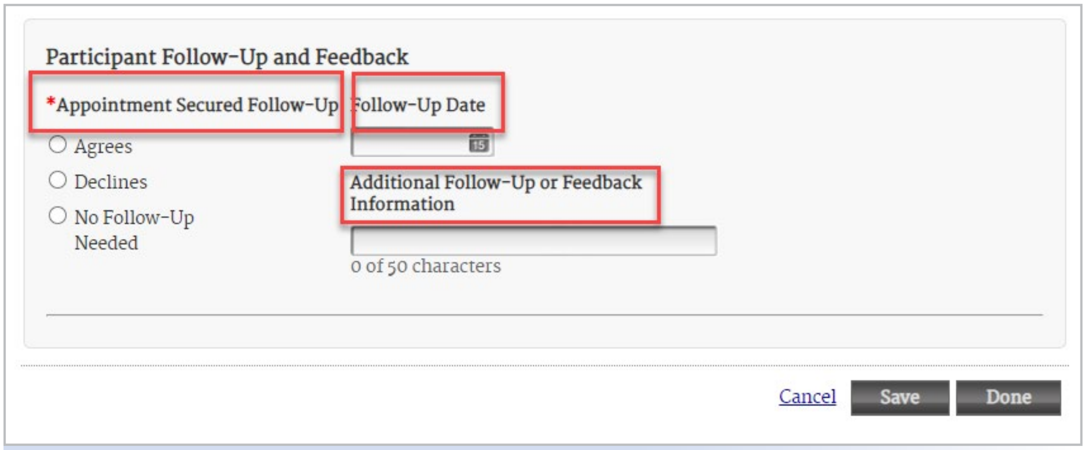


Figure 69

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.

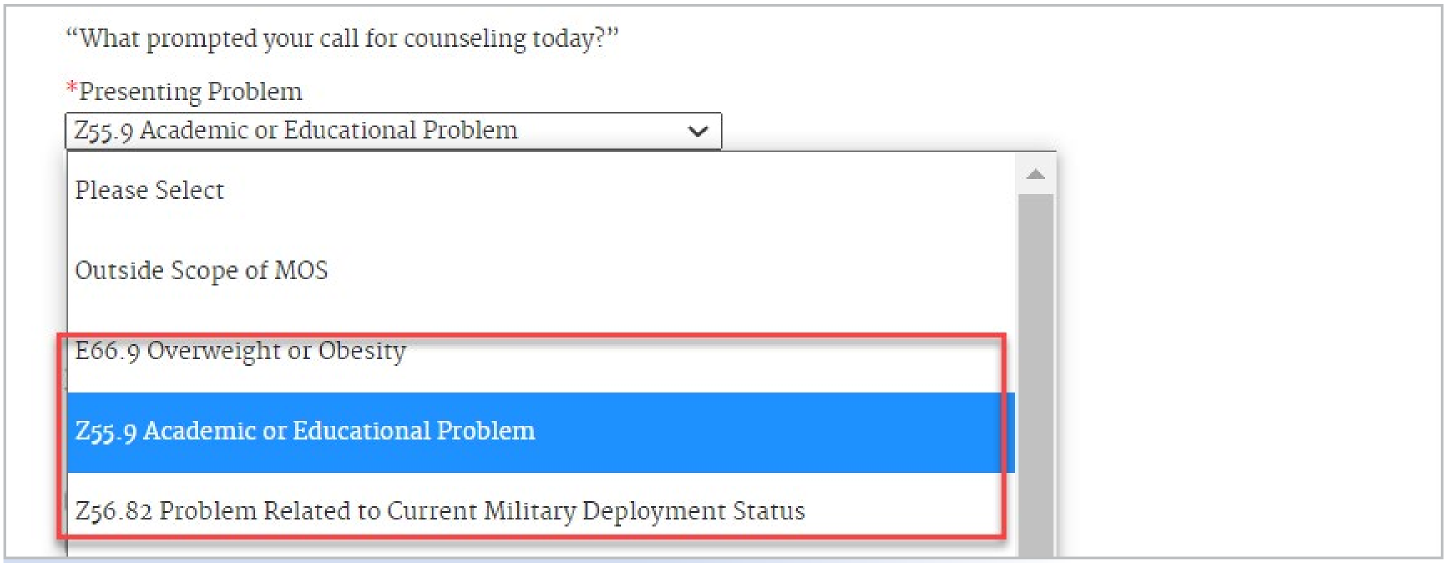


Figure 70

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

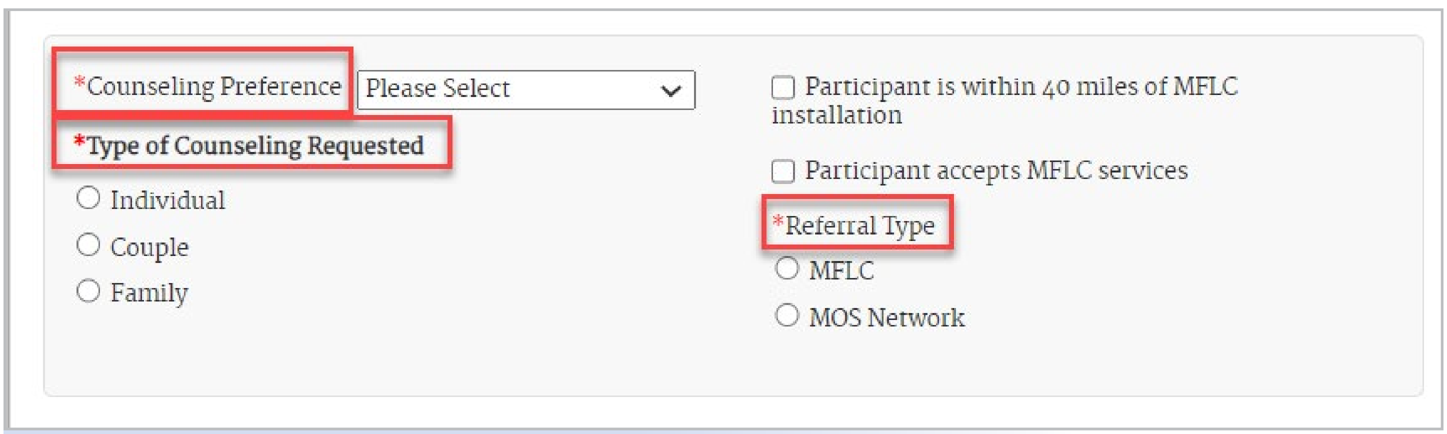


Figure 71

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.

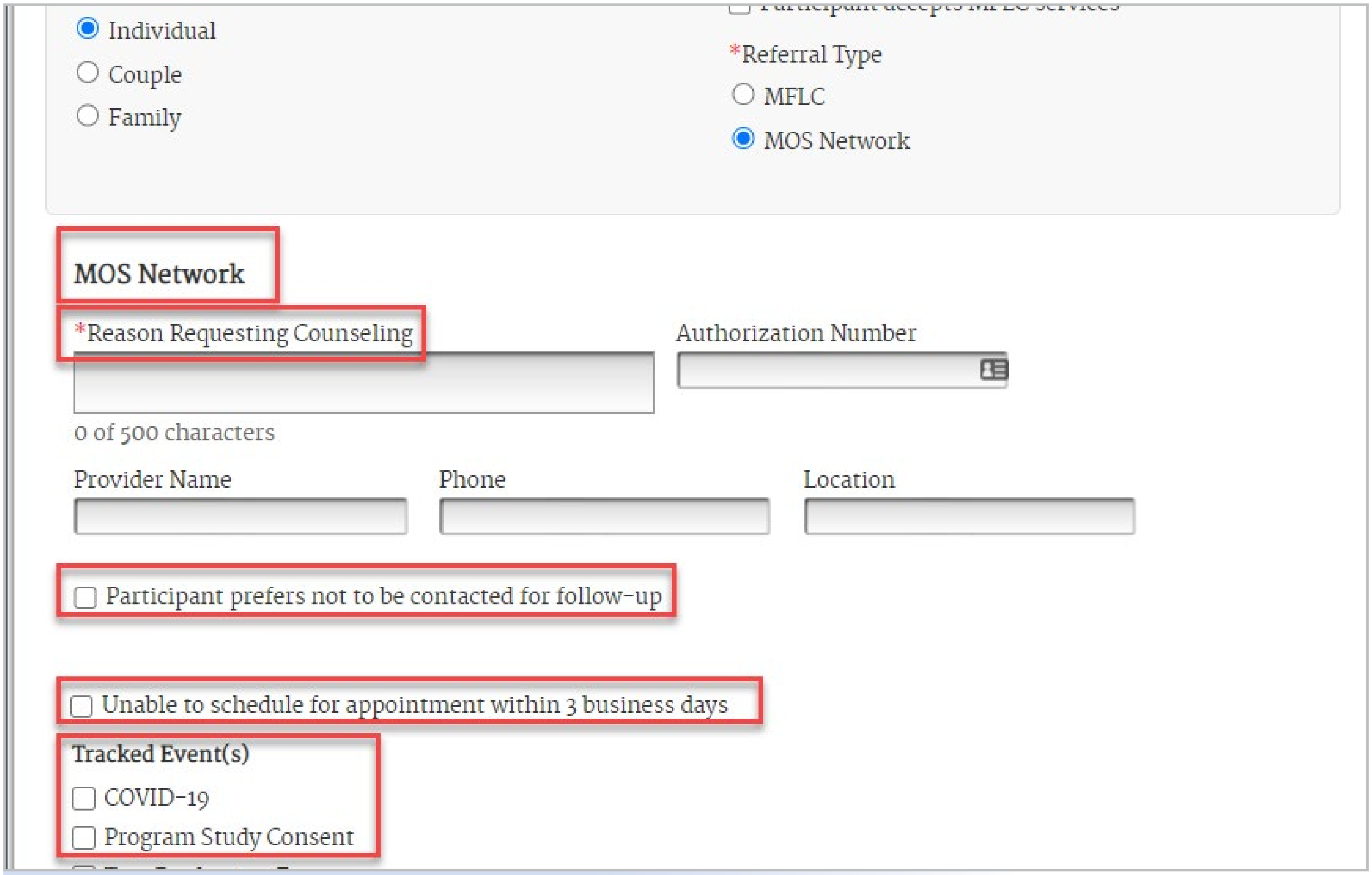


Figure 72

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.

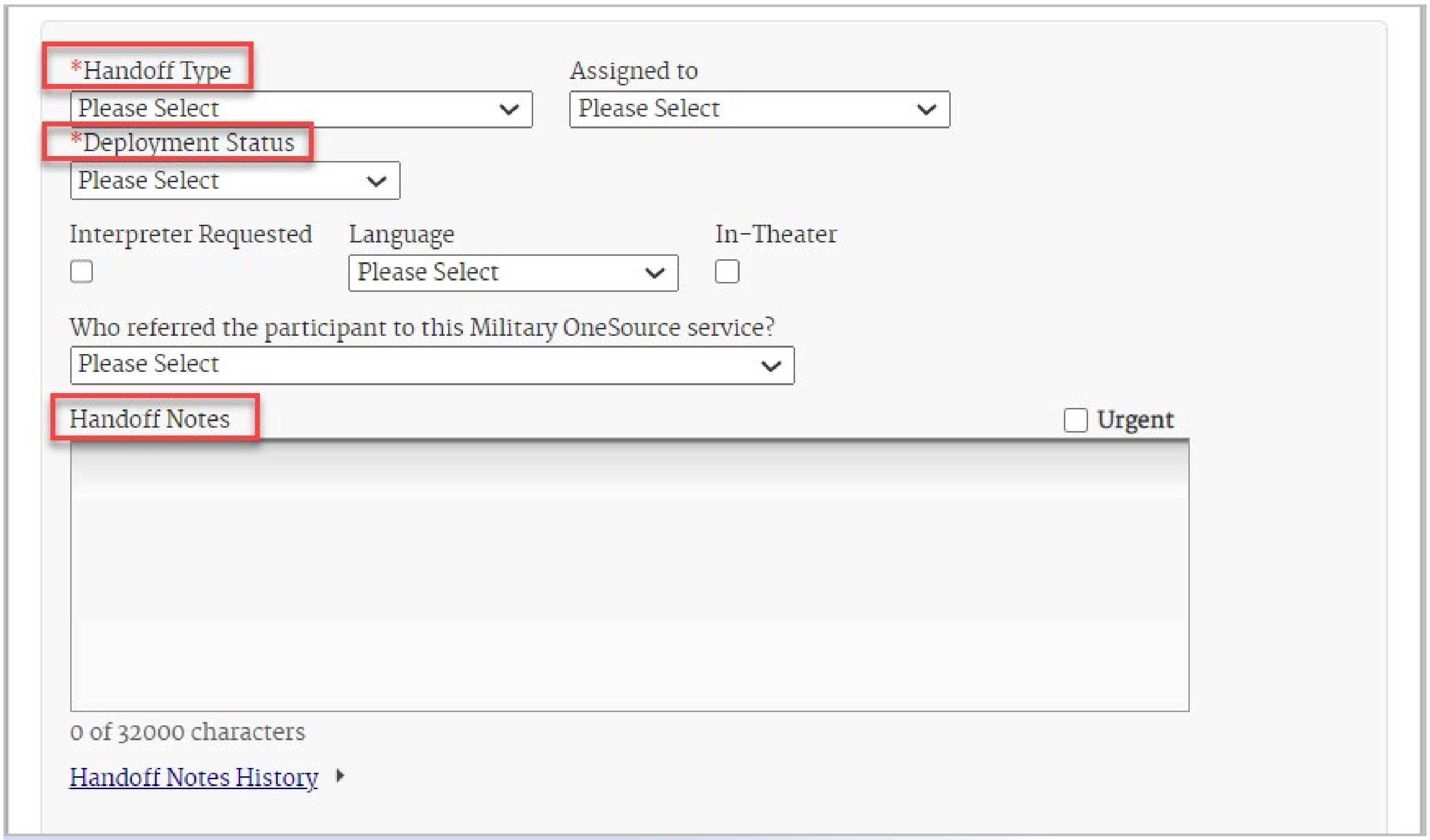


Figure 73

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.

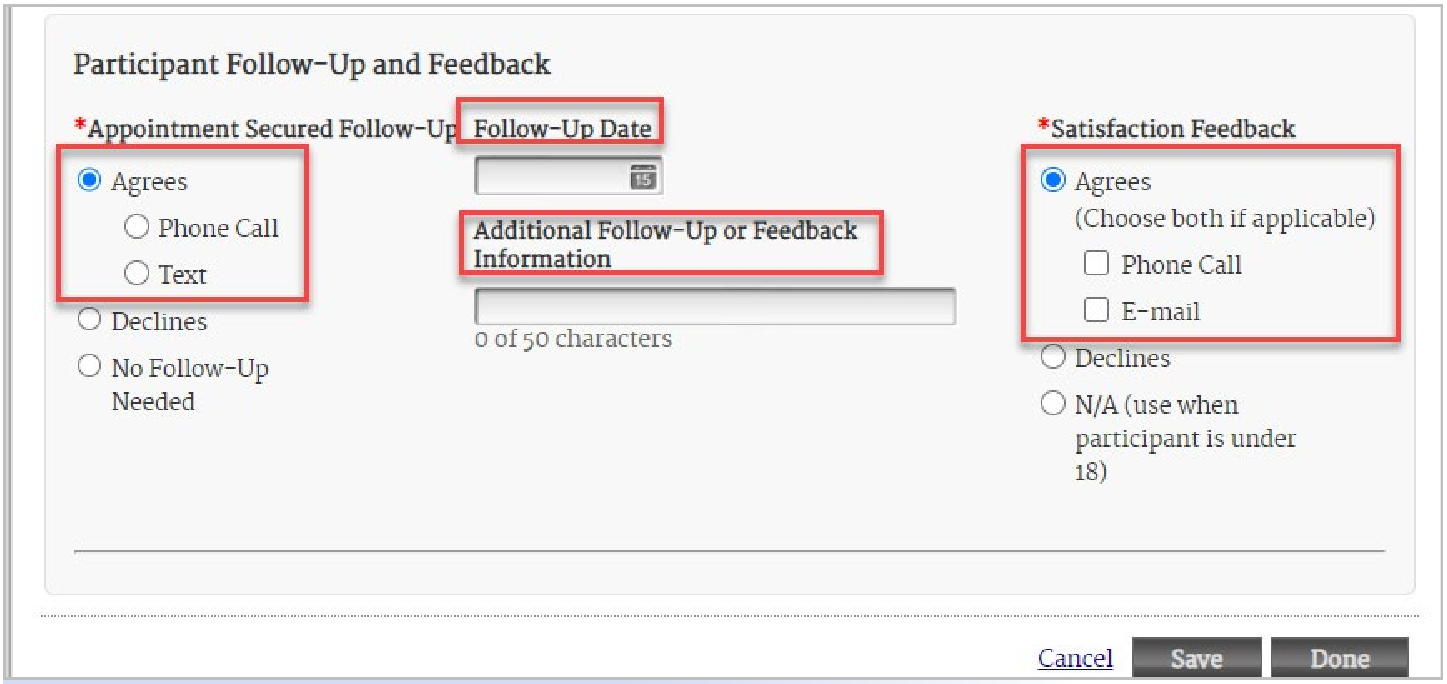


Figure 74

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.

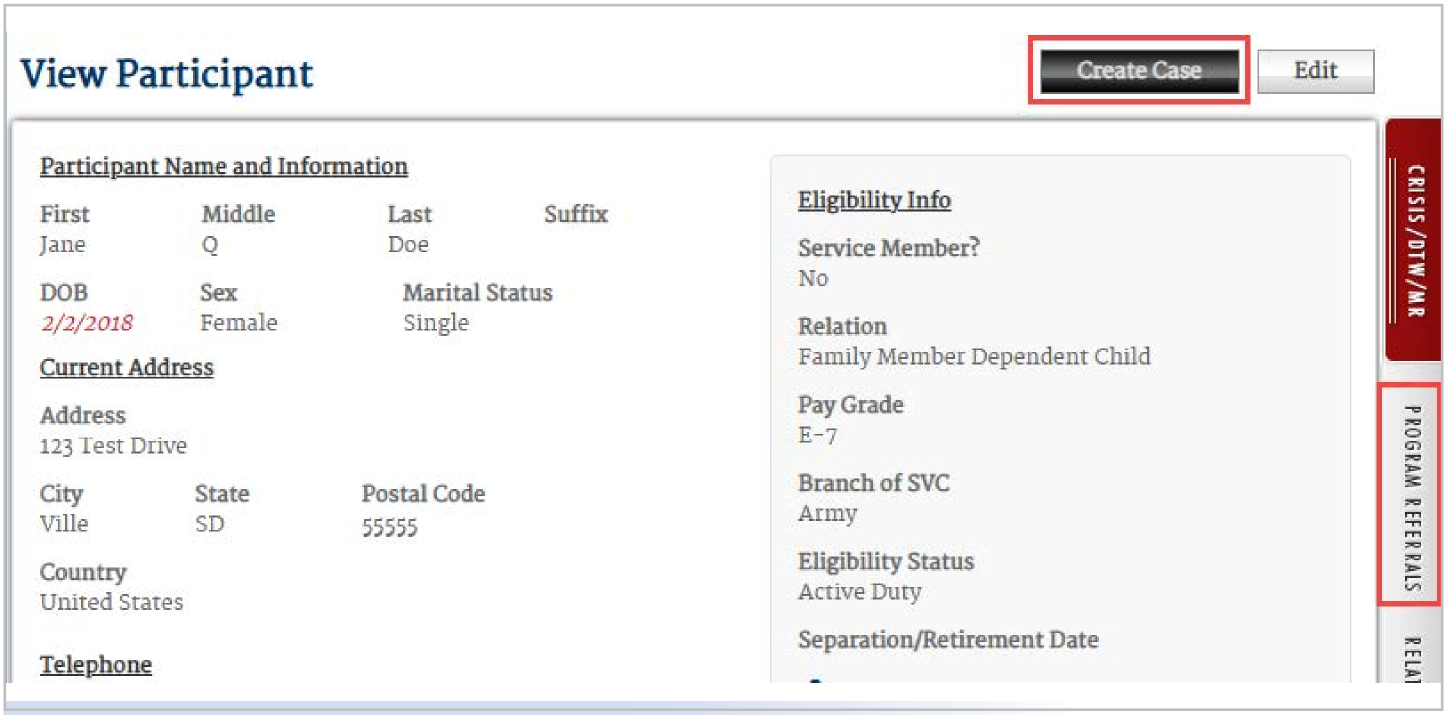


Figure 75

Select "SECO."

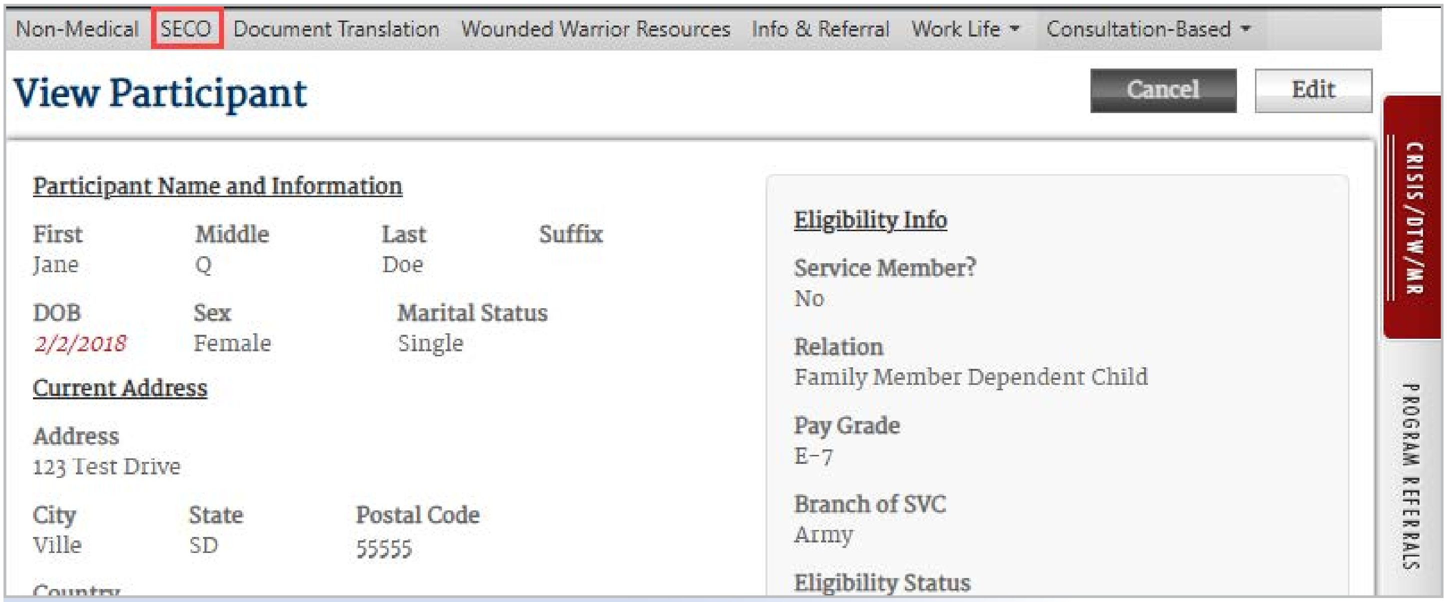


Figure 76

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.

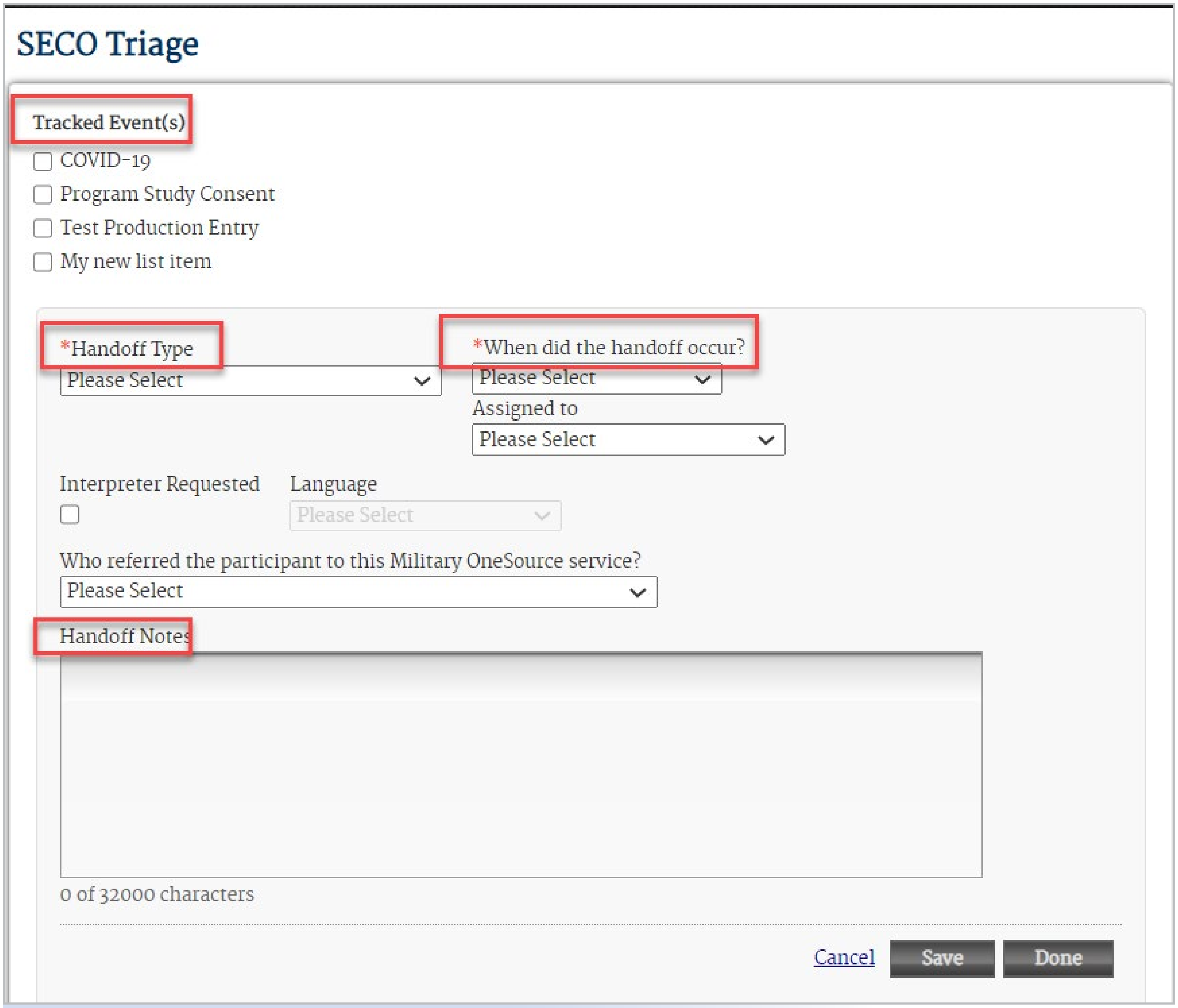


Figure 77

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."

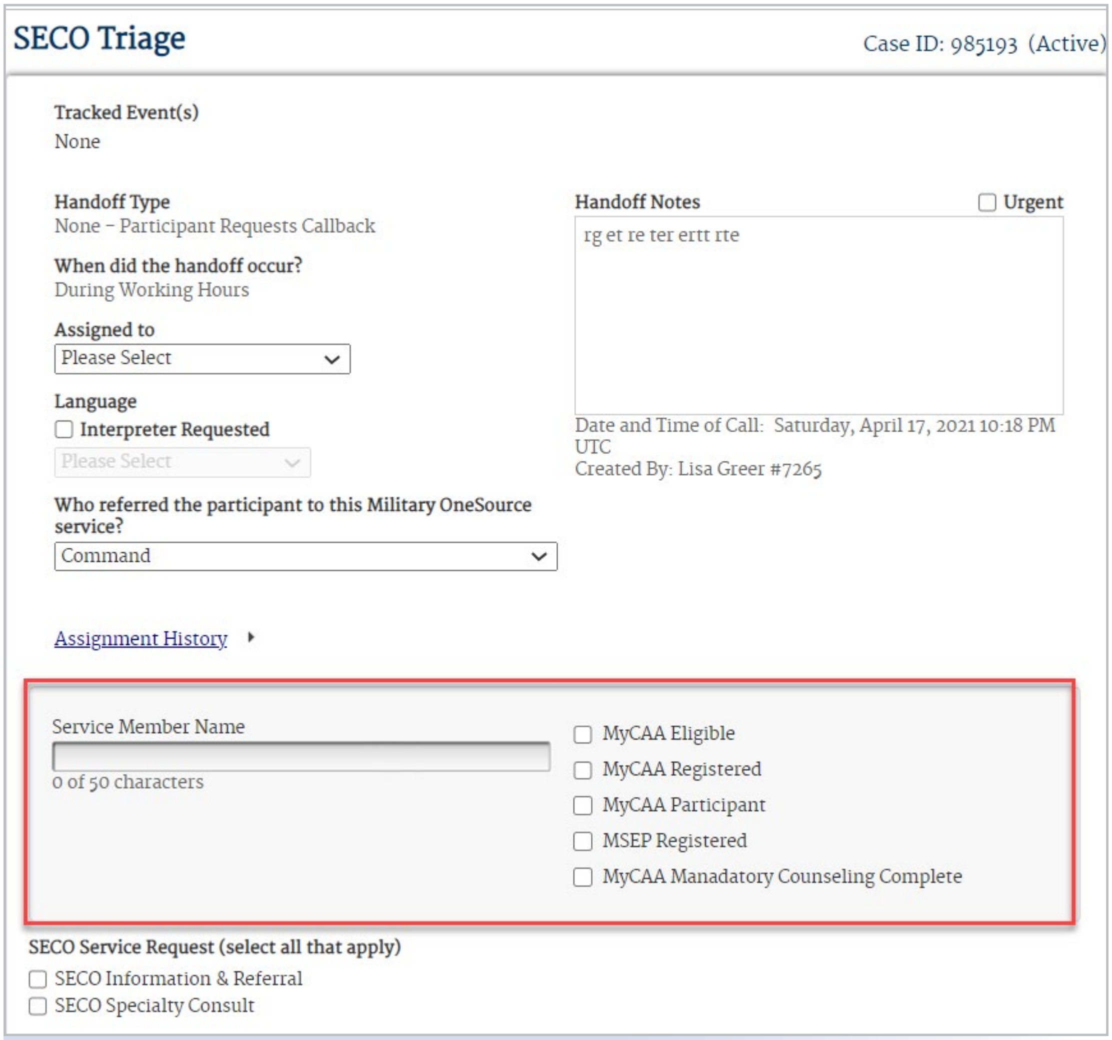


Figure 78

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.

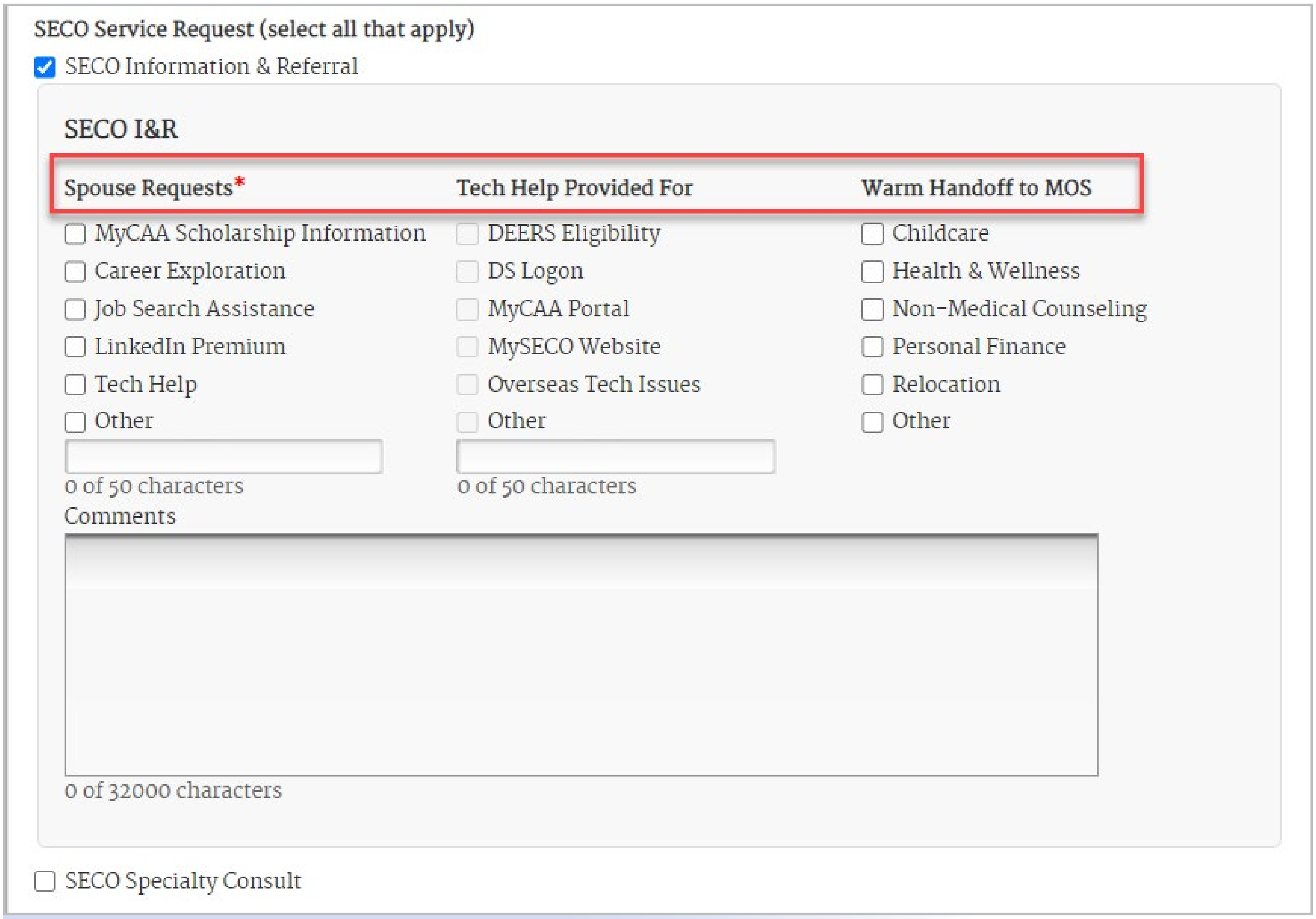


Figure 79

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.

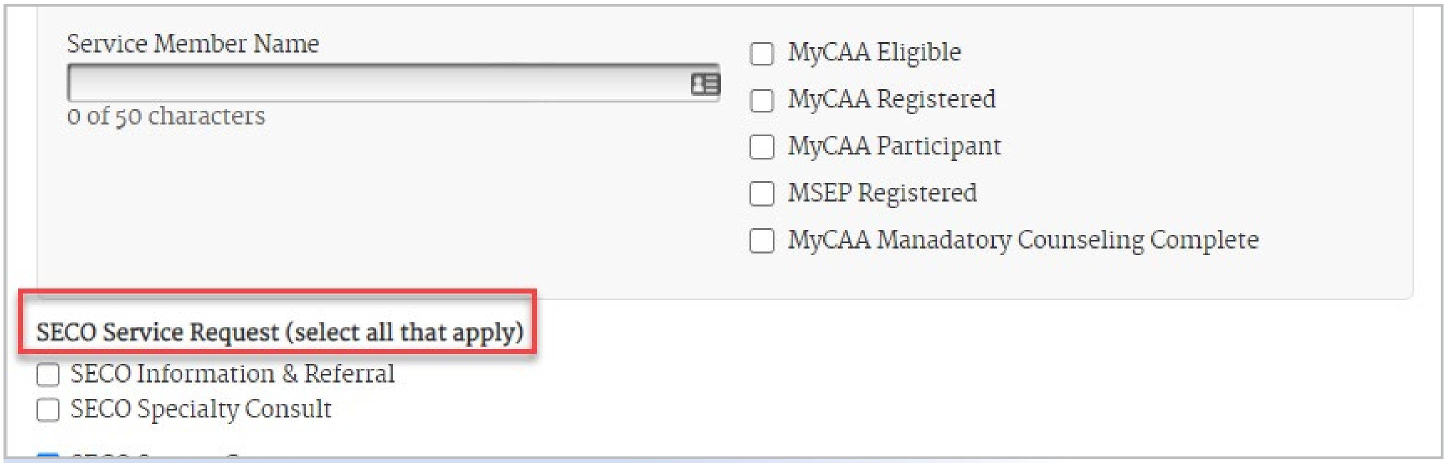


Figure 80

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.

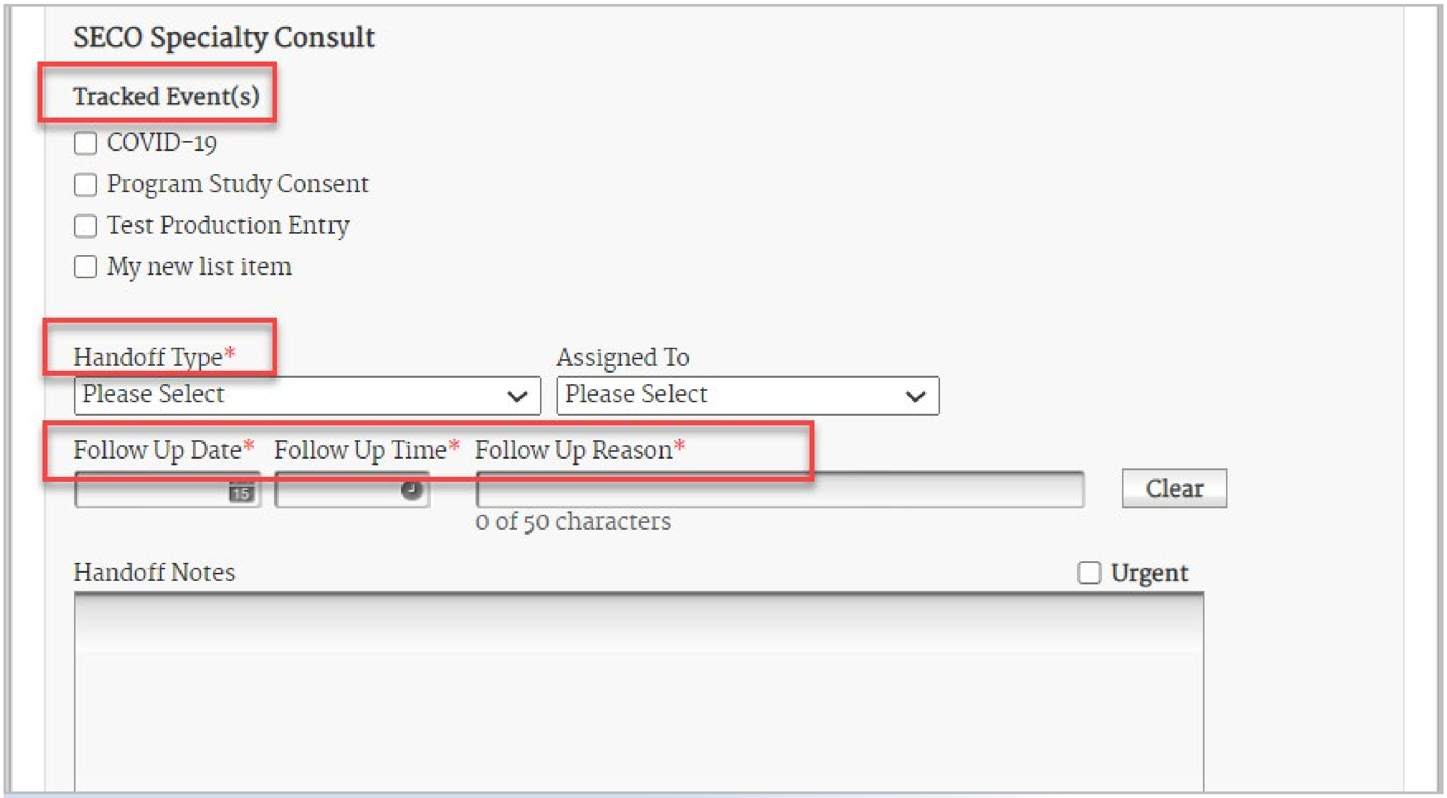


Figure 81

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.

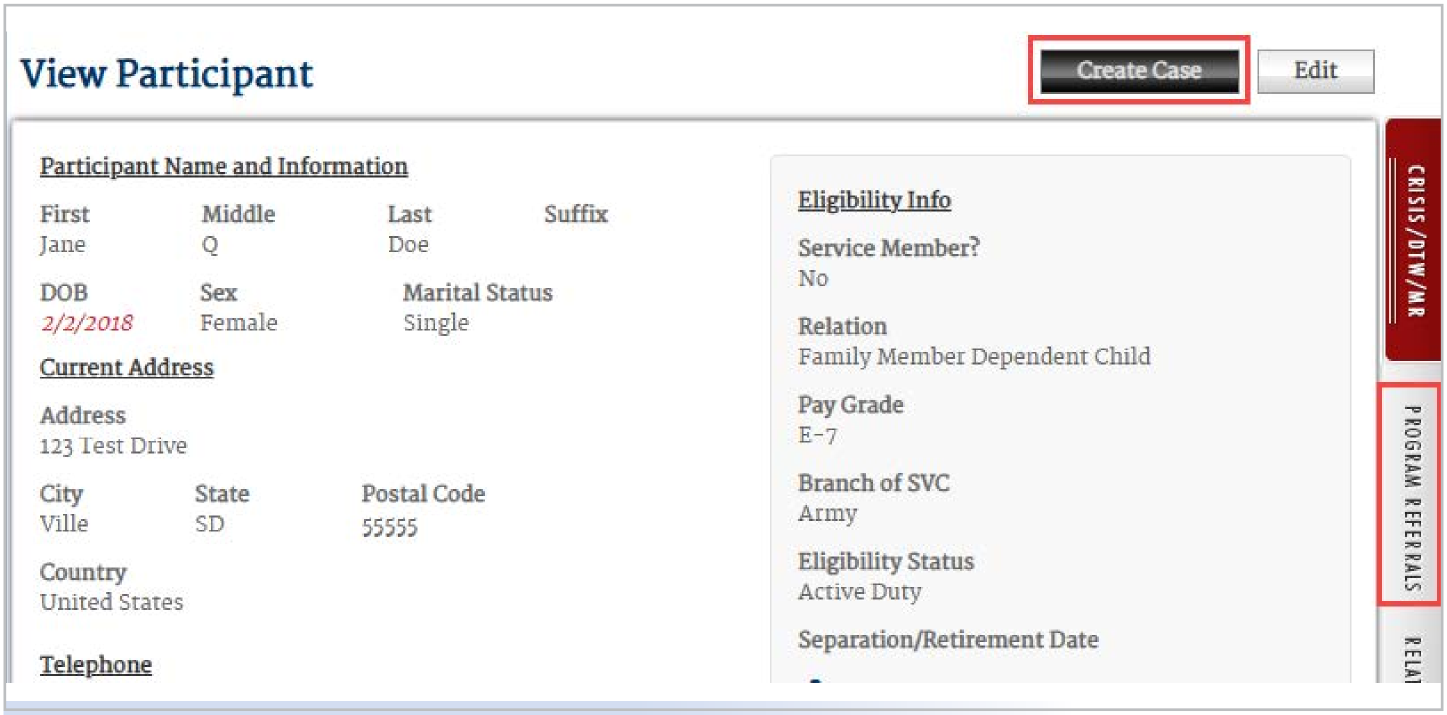


Figure 82

Select "Document Translation."

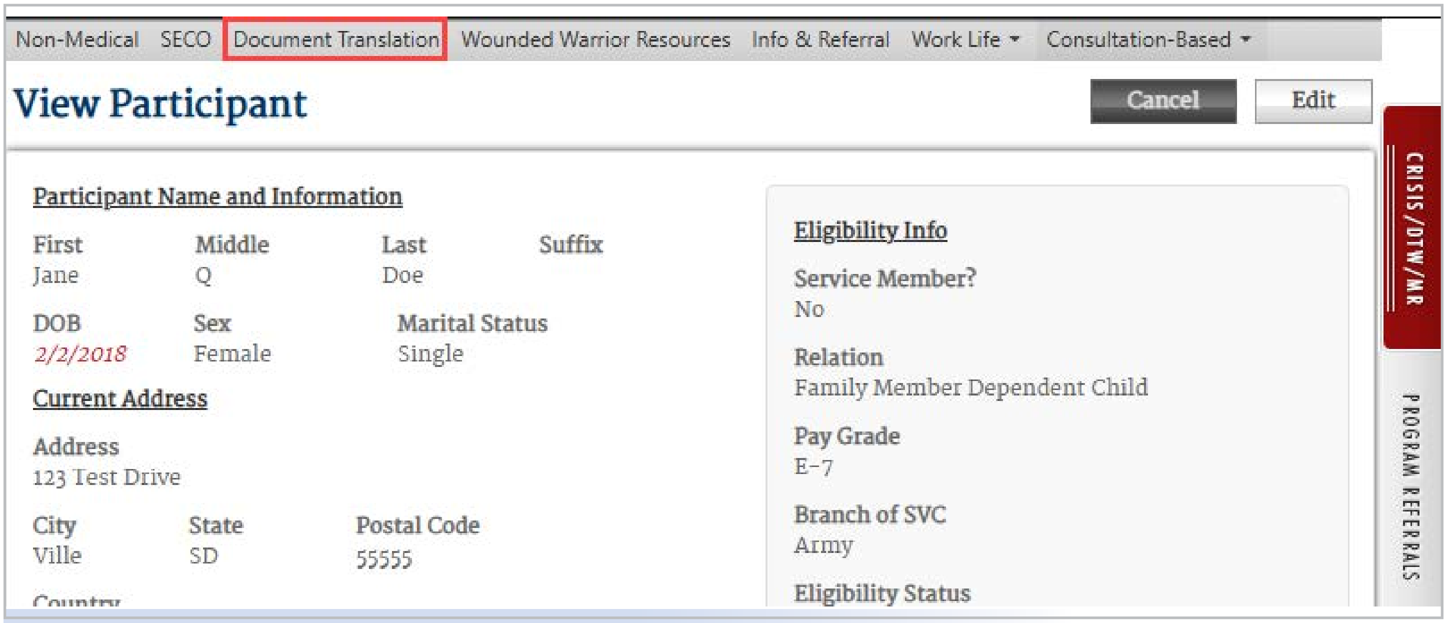


Figure 83

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).

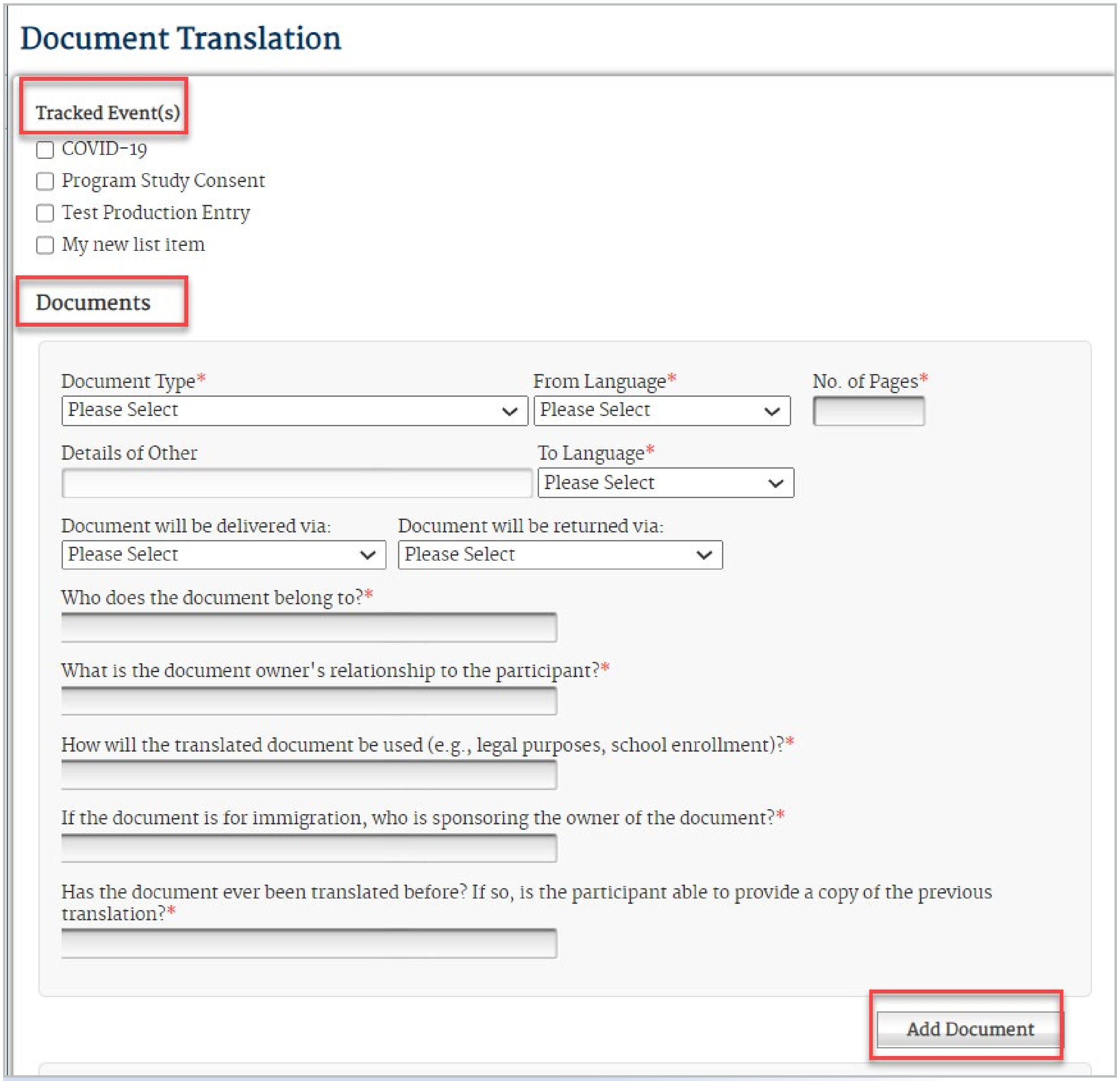


Figure 84

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.

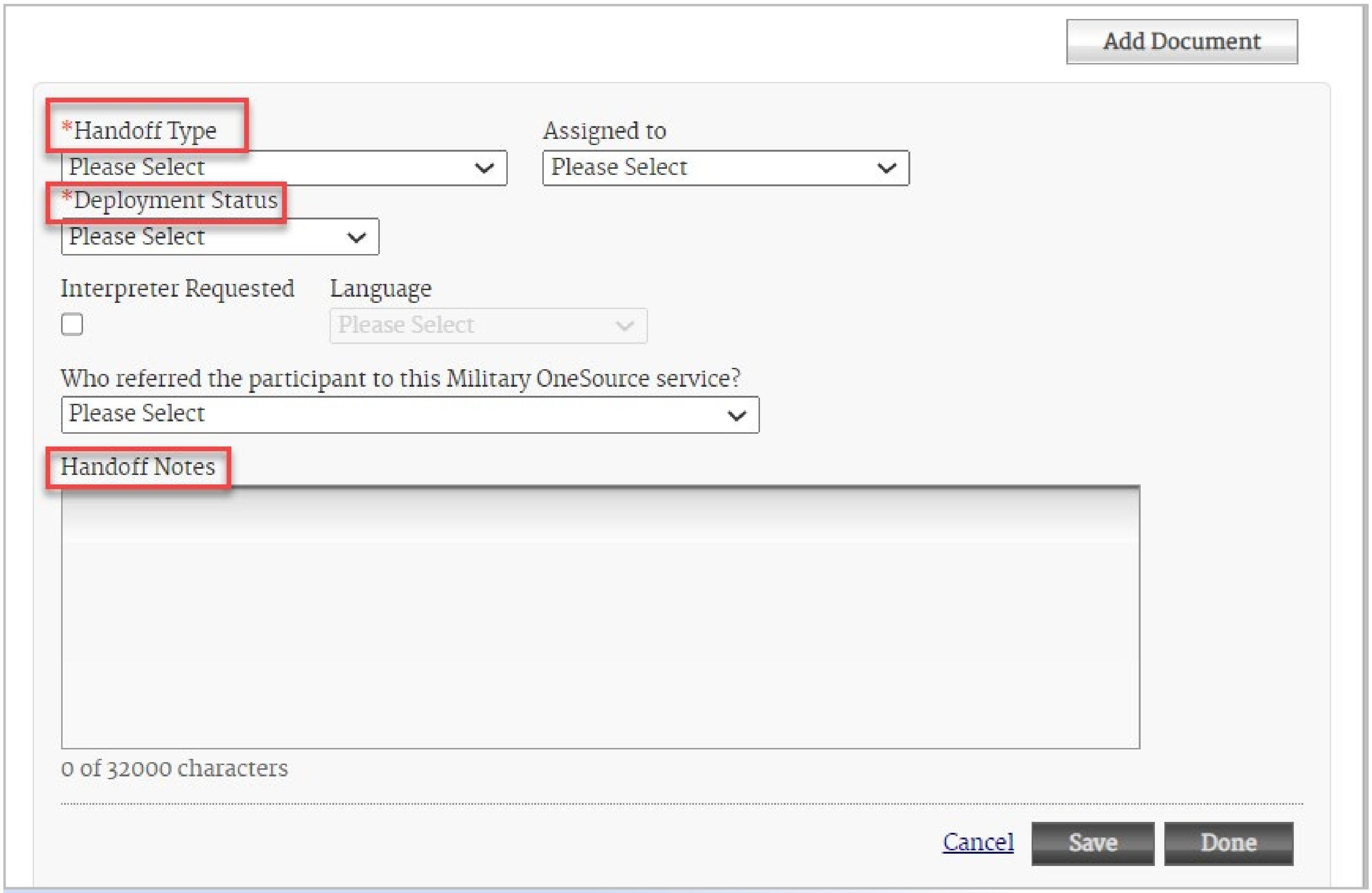


Figure 85

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.

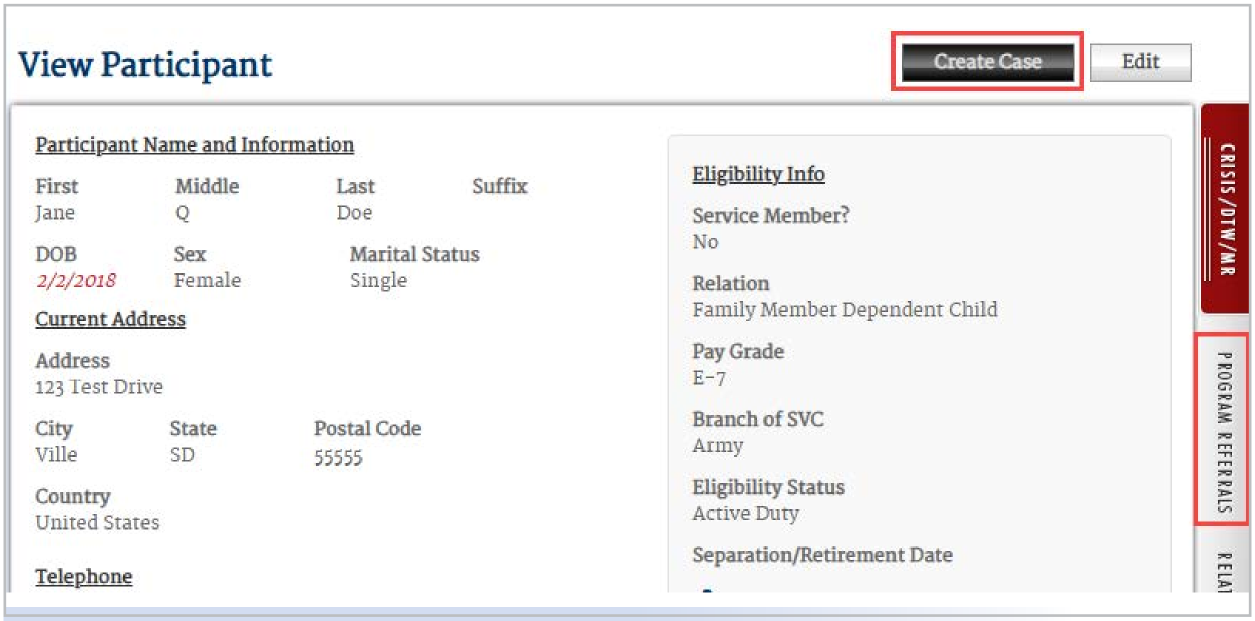


Figure 86

Select the case type you want to create.

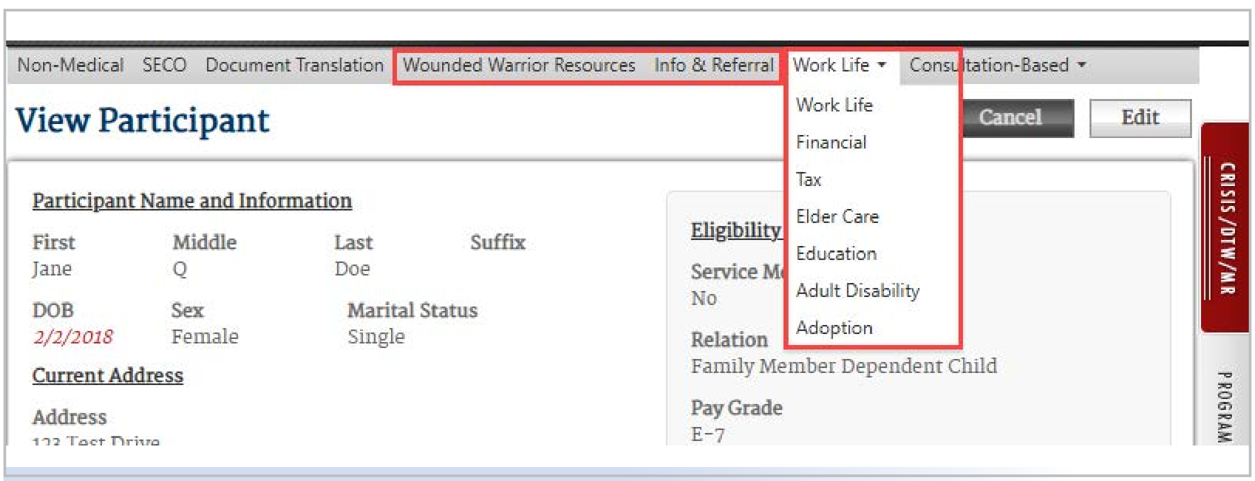


Figure 87

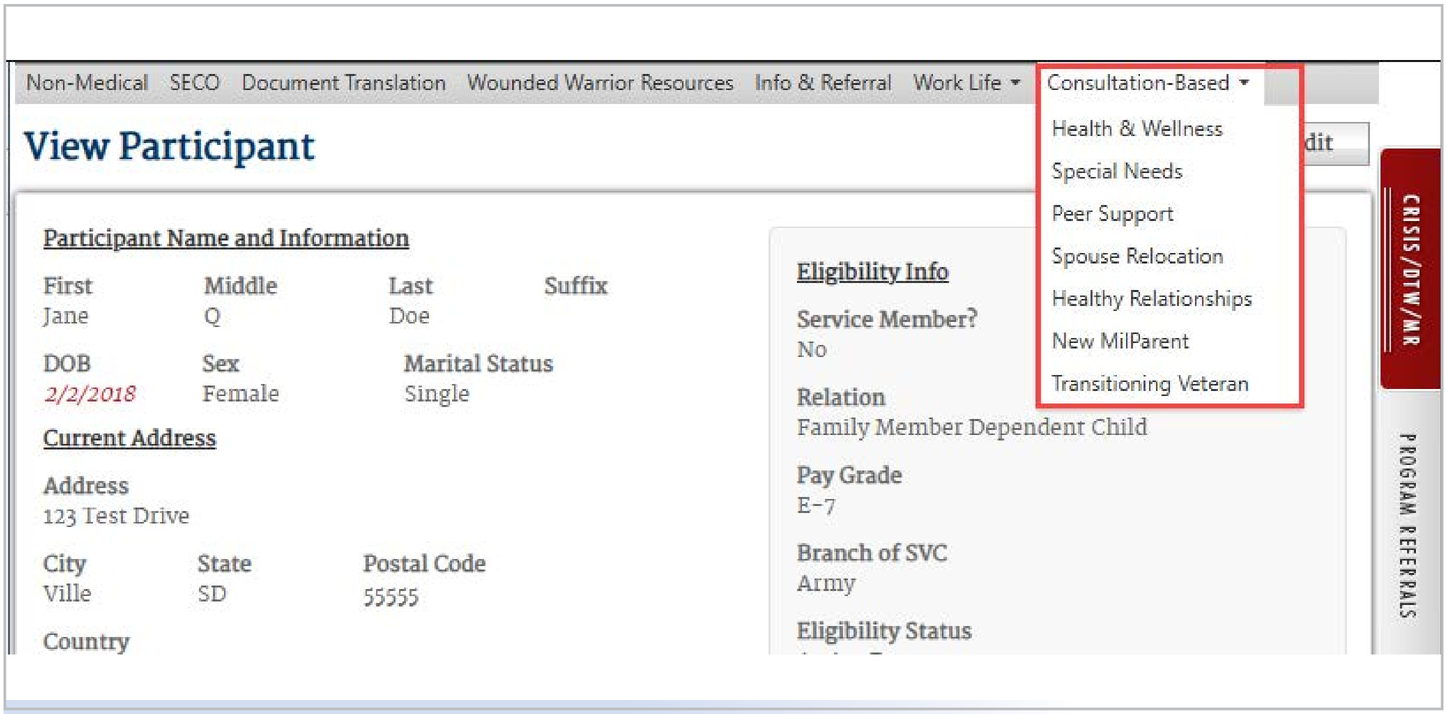


Figure 88

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.

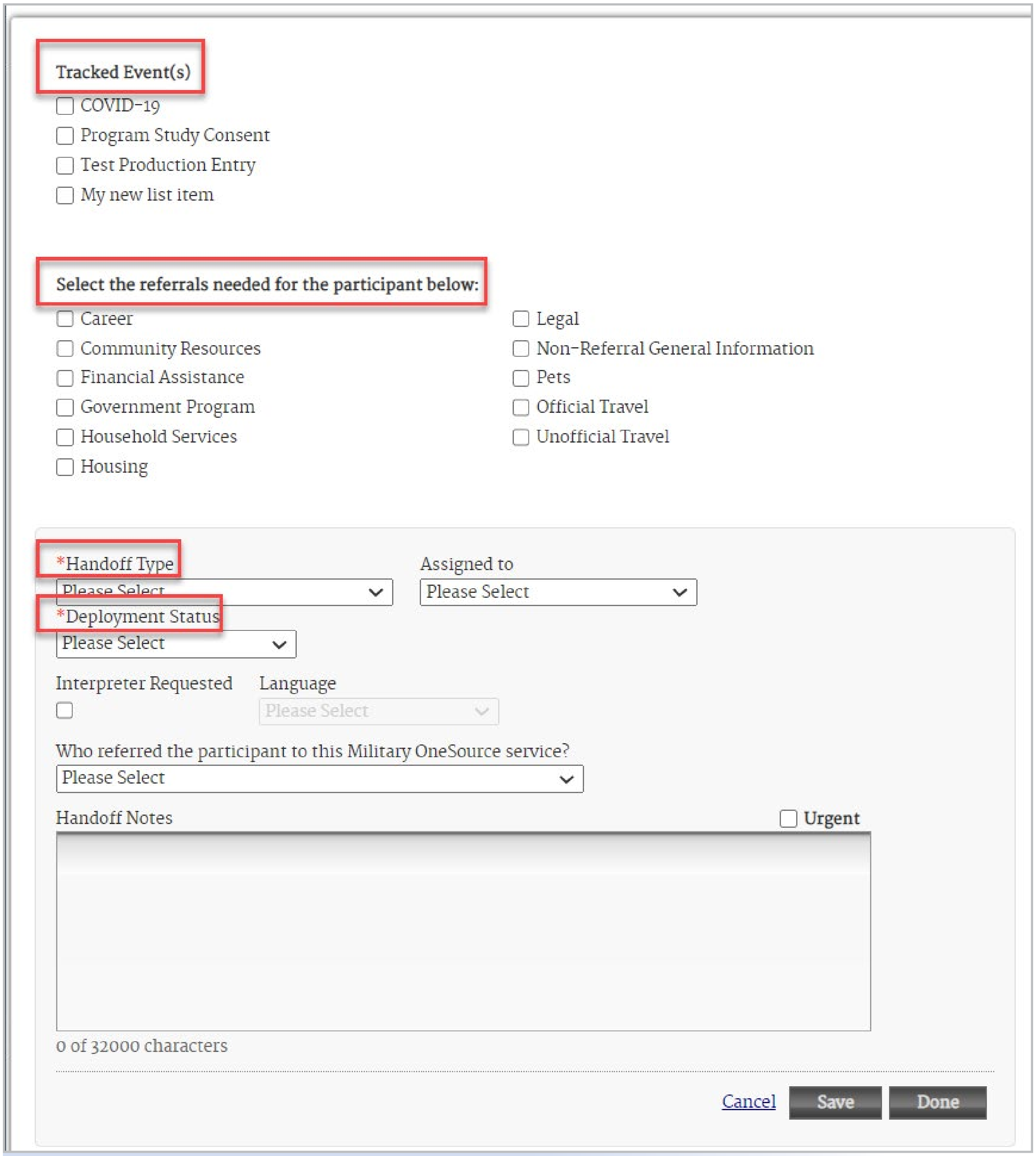


Figure 89

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."

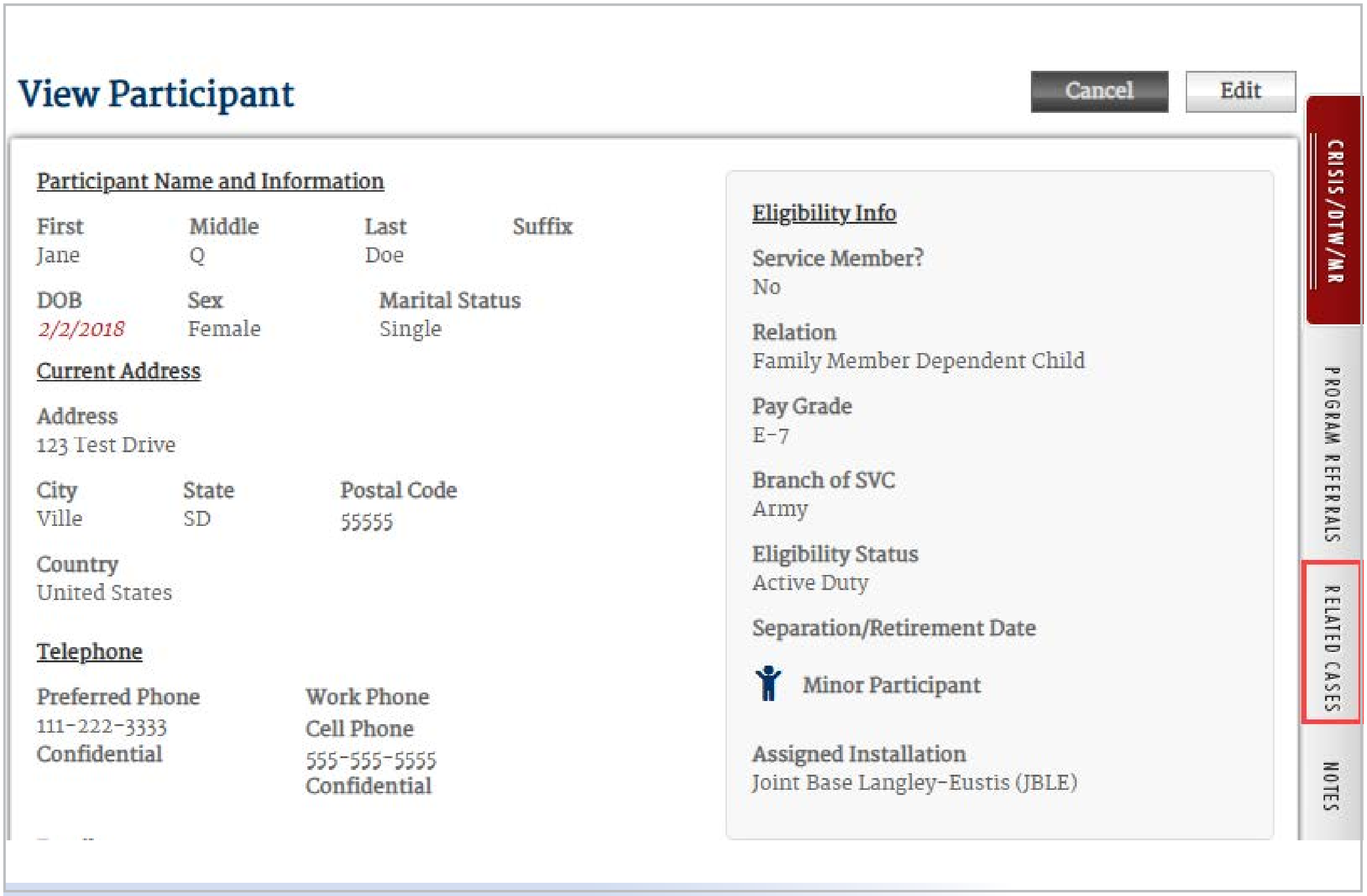


Figure 90

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
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 10 20 30 Page 1 of 7 (66 items) 1 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.

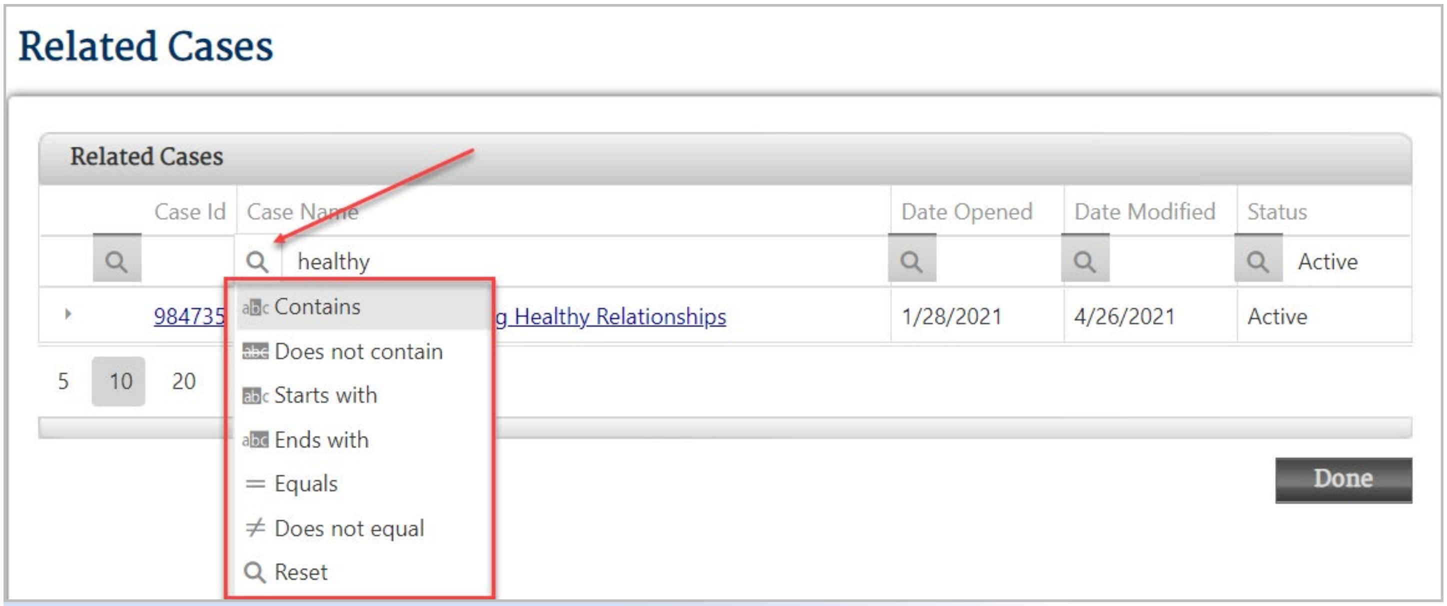


Figure 92

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

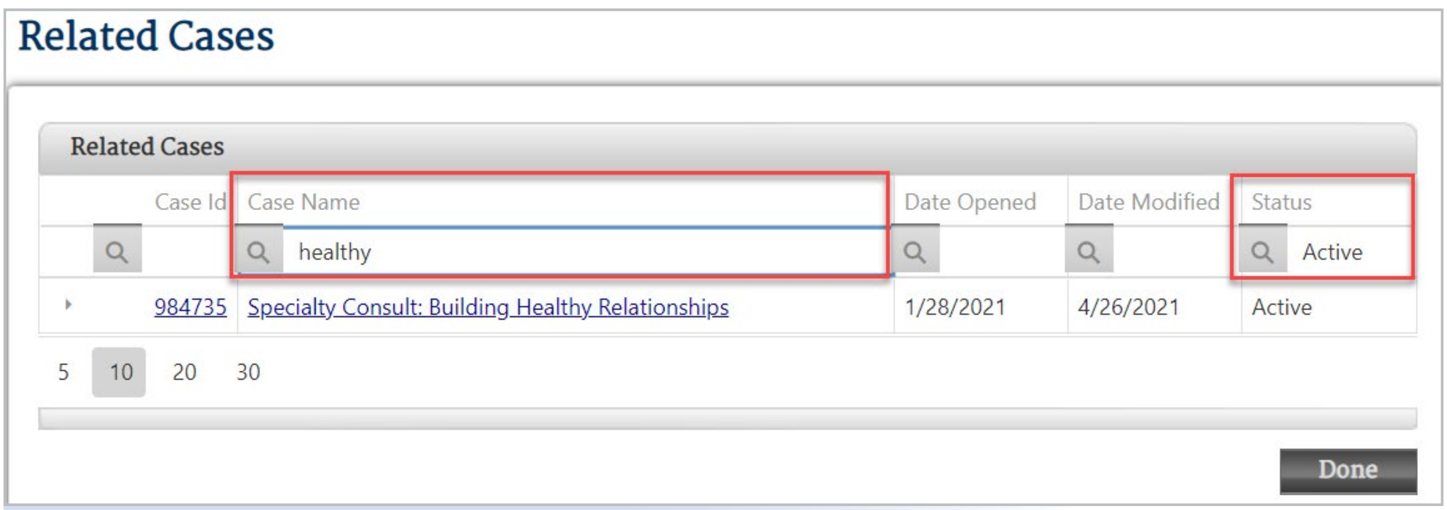
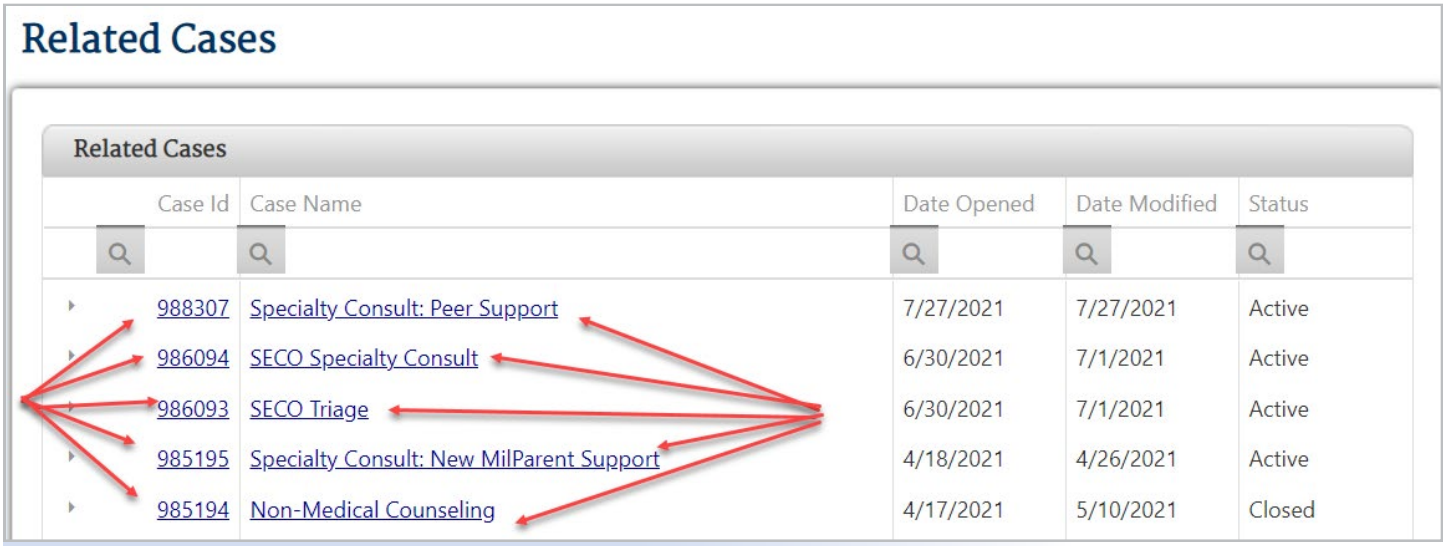


Figure 93

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
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."

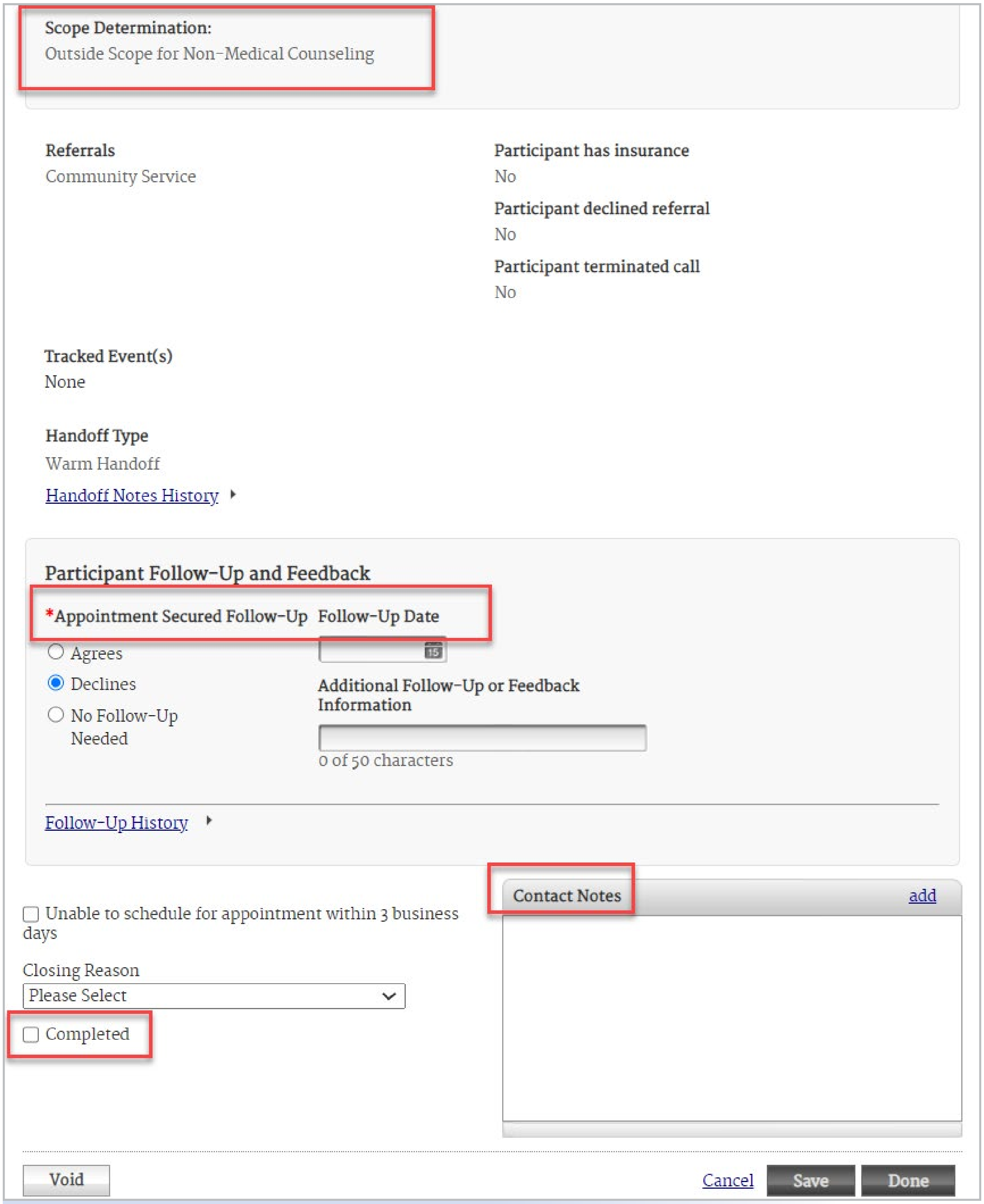
8.1. Overview

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
Agrees
Declines
No Follow-Up Needed

Follow-Up Date

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

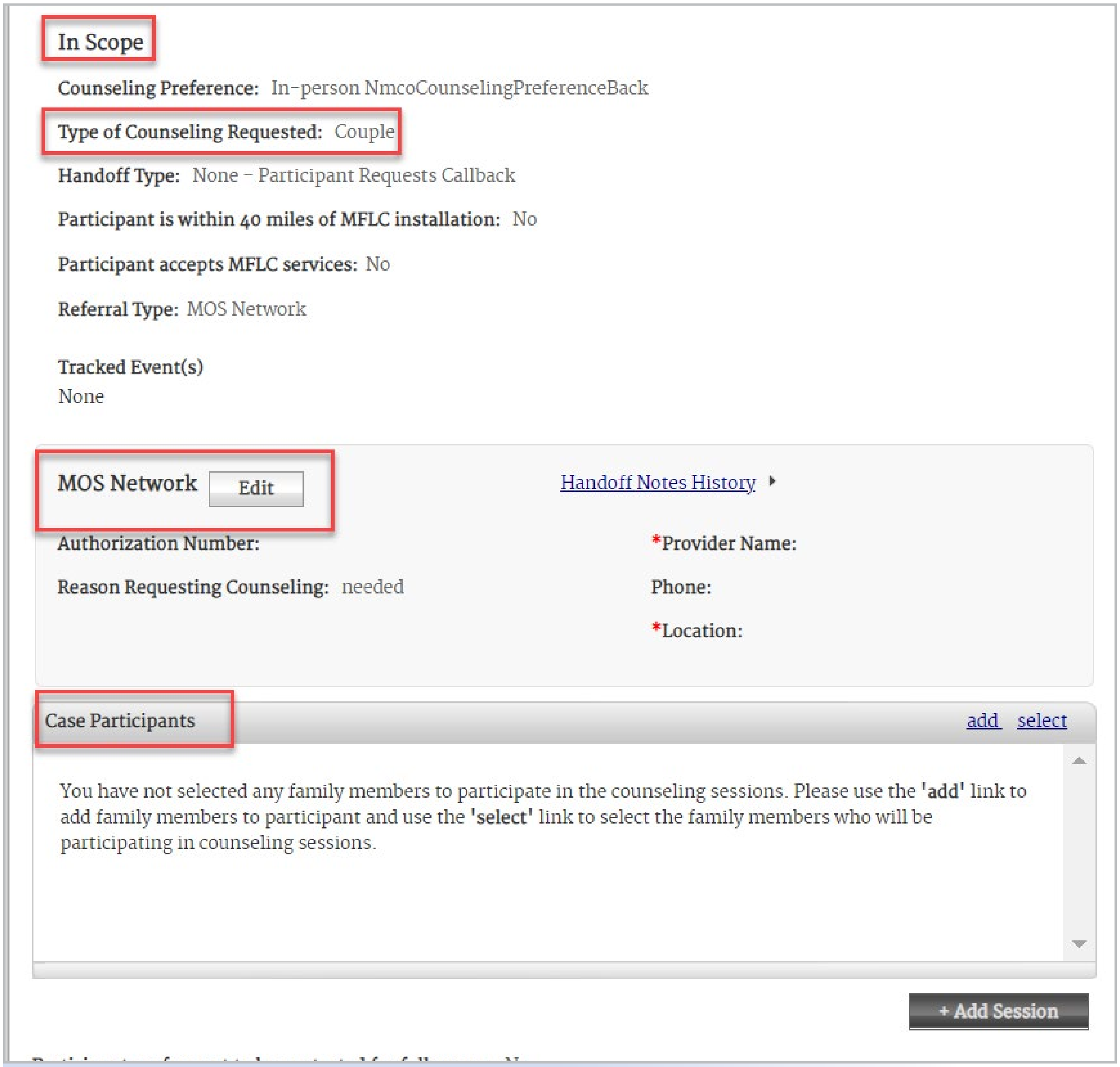
Void

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 Edit

Handoff Notes History

Authorization Number:

Reason Requesting Counseling: needed

*Provider Name:

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.

+ Add Session

Figure 96

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

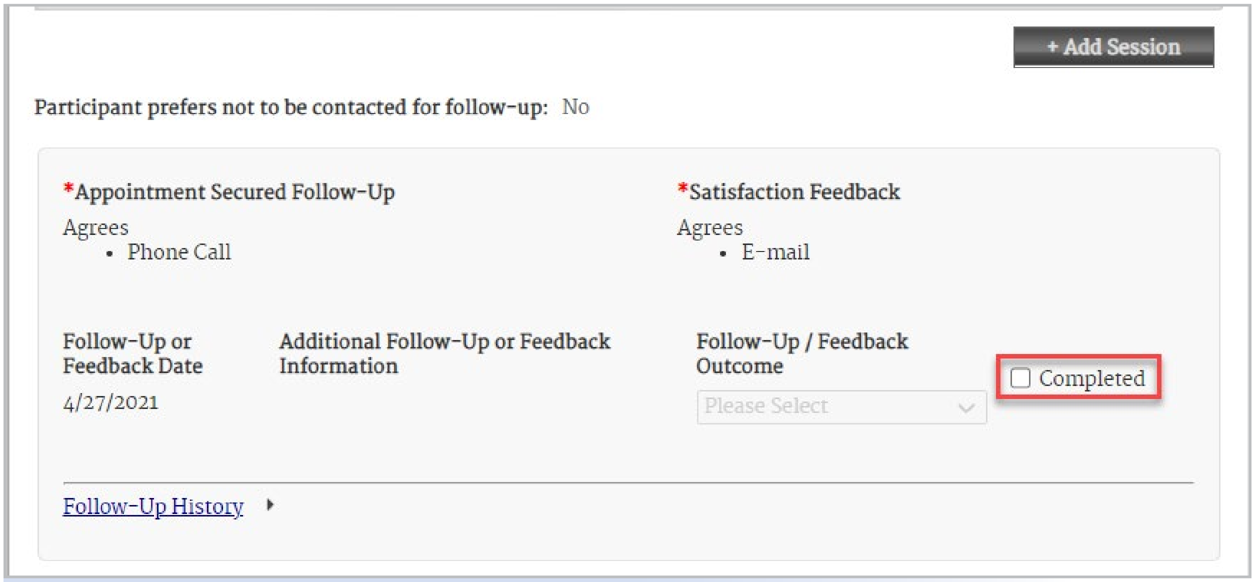


Figure 97

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

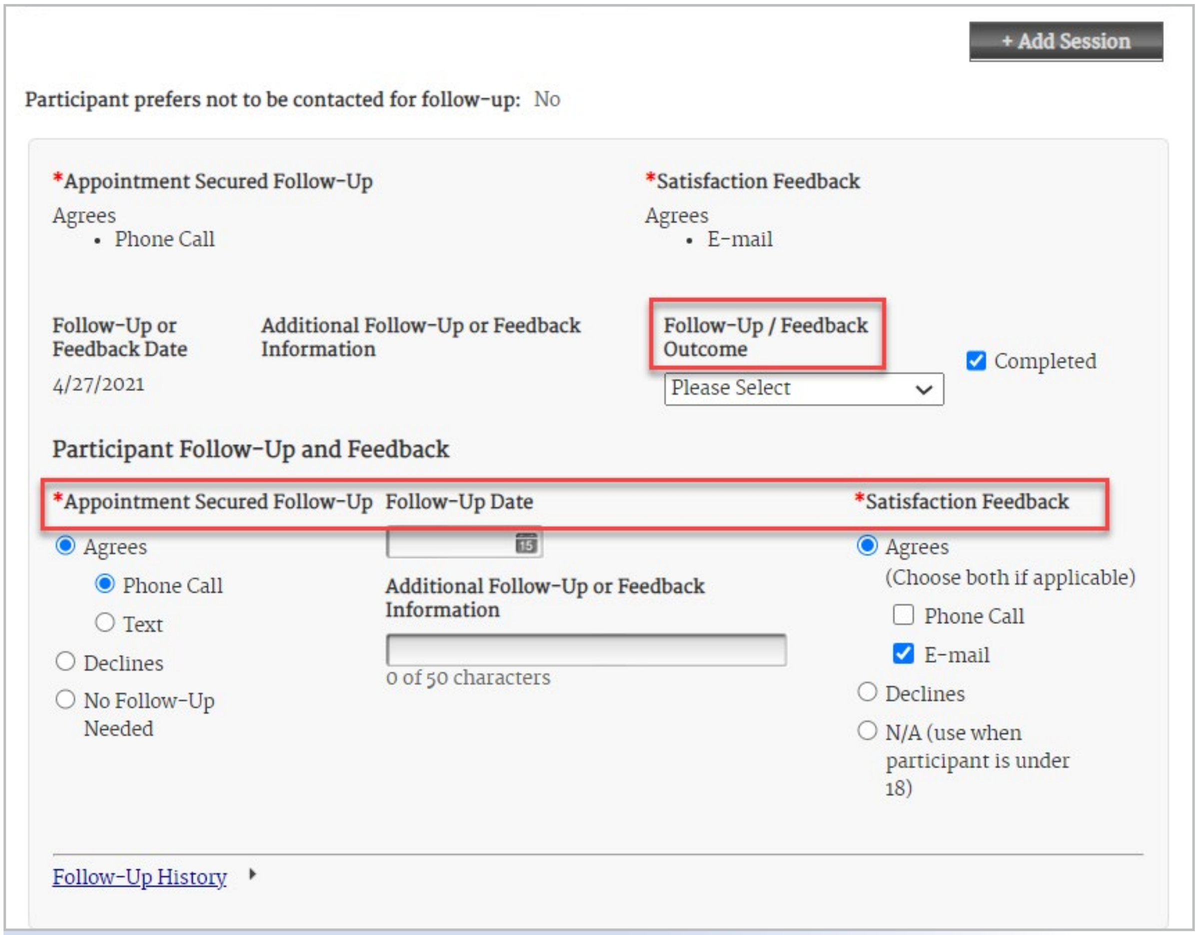


Figure 98

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

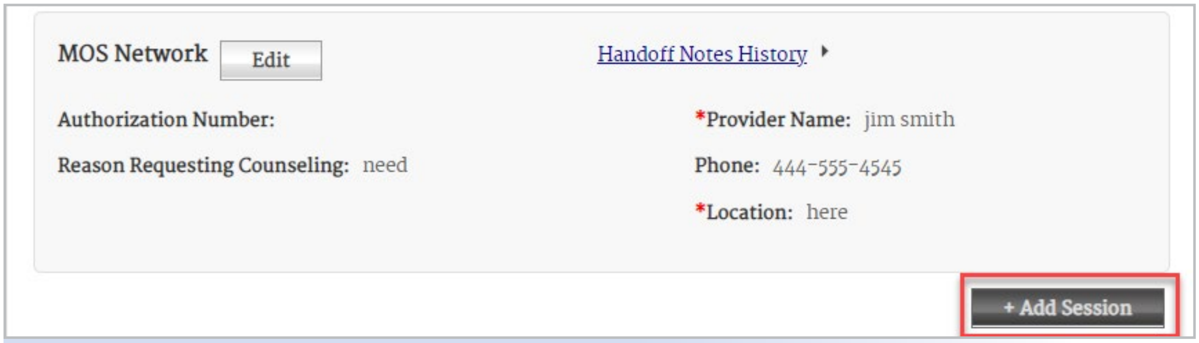


Figure 99

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.

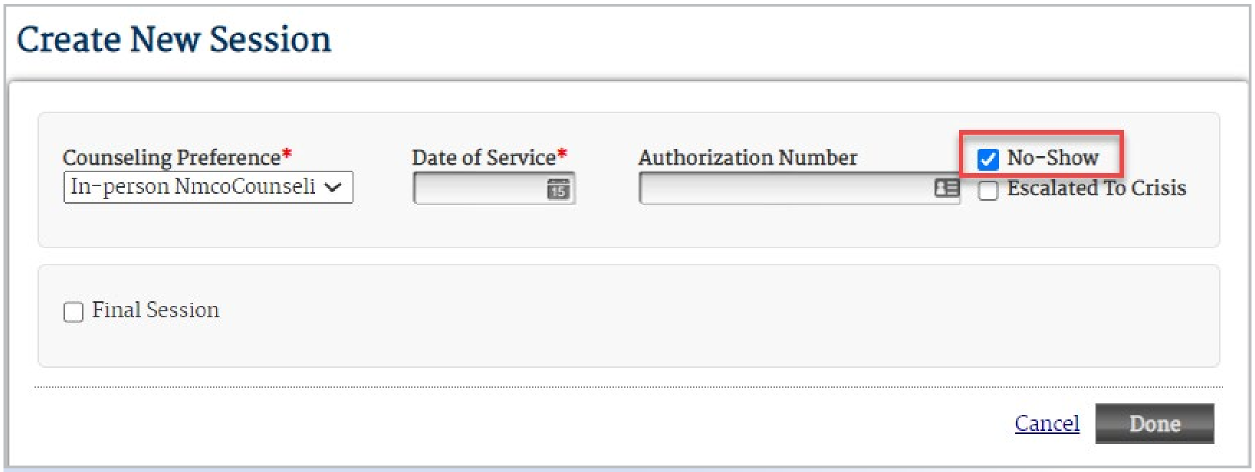


Figure 100

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.

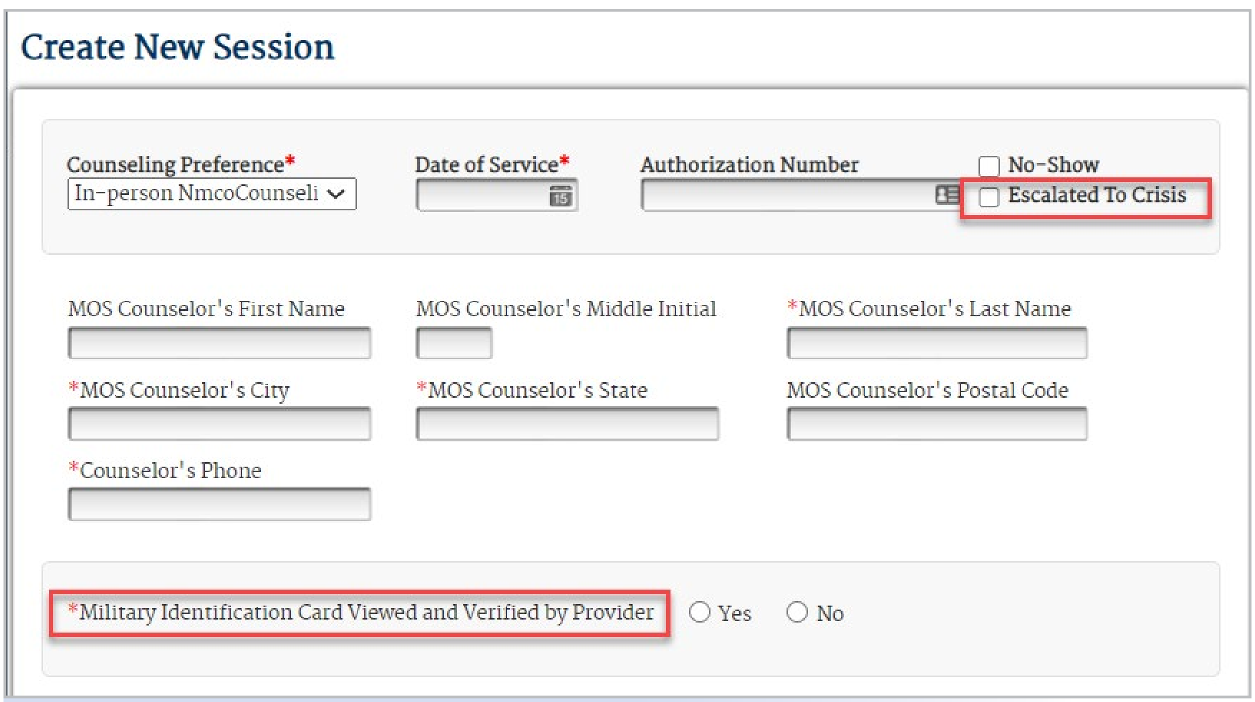


Figure 101

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.

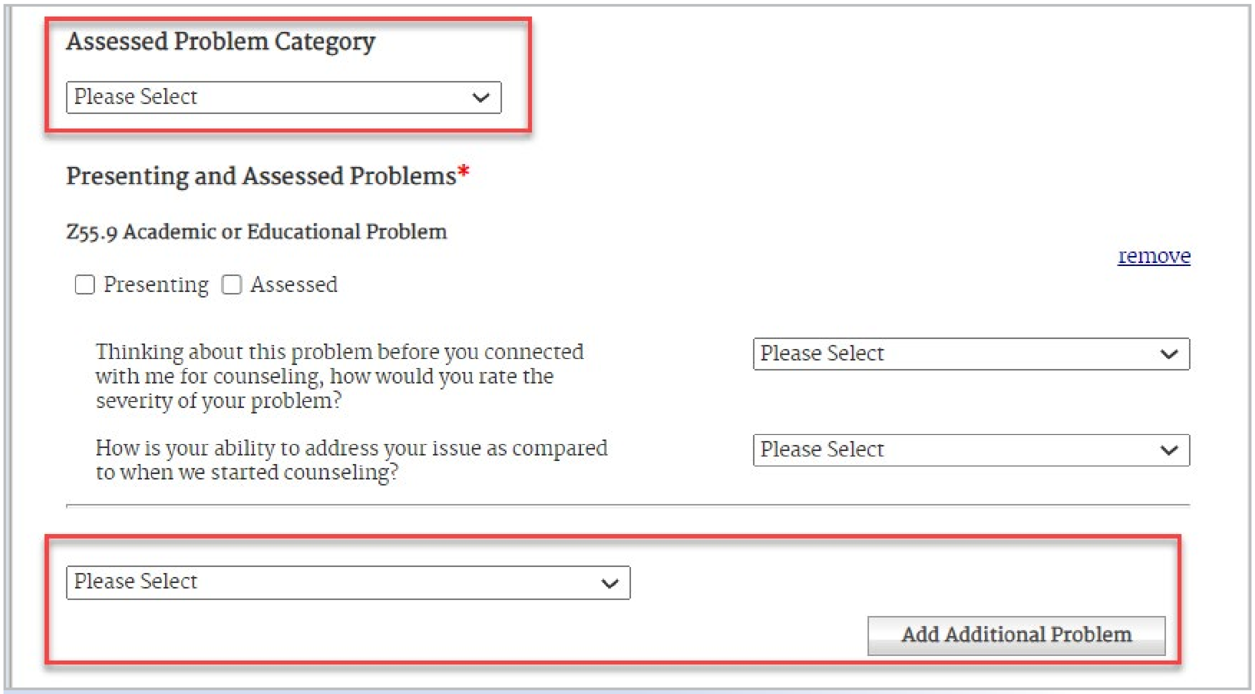


Figure 102

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

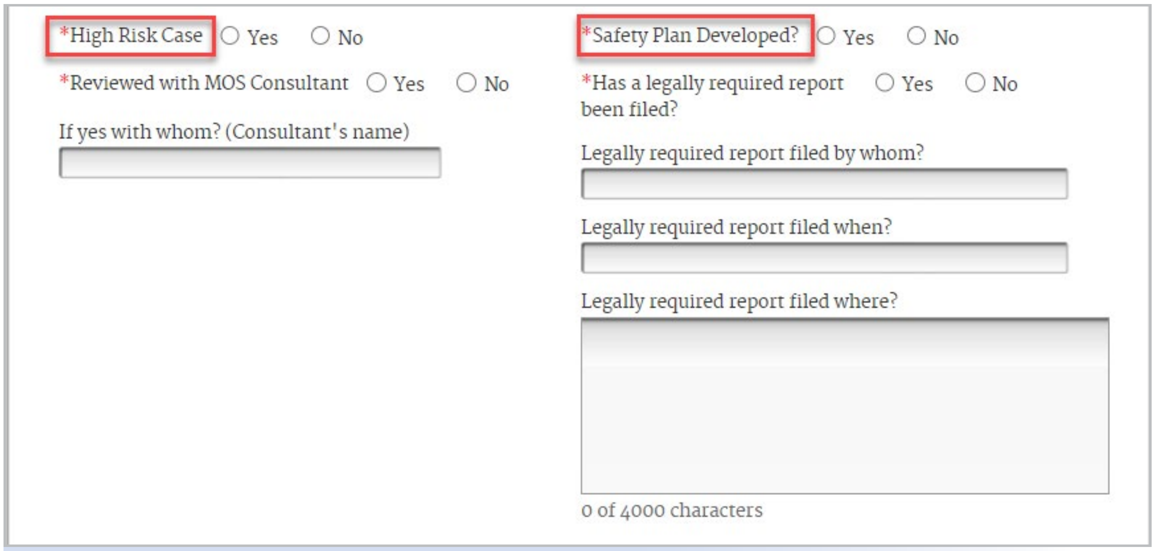


Figure 103

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."

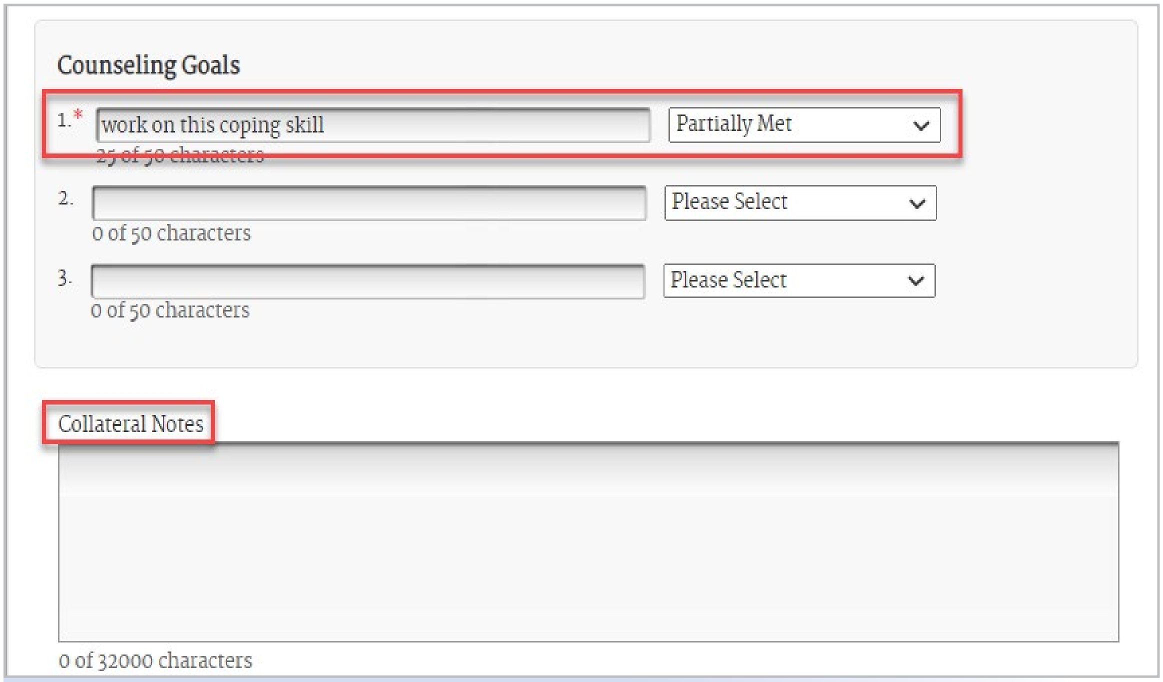


Figure 104

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."

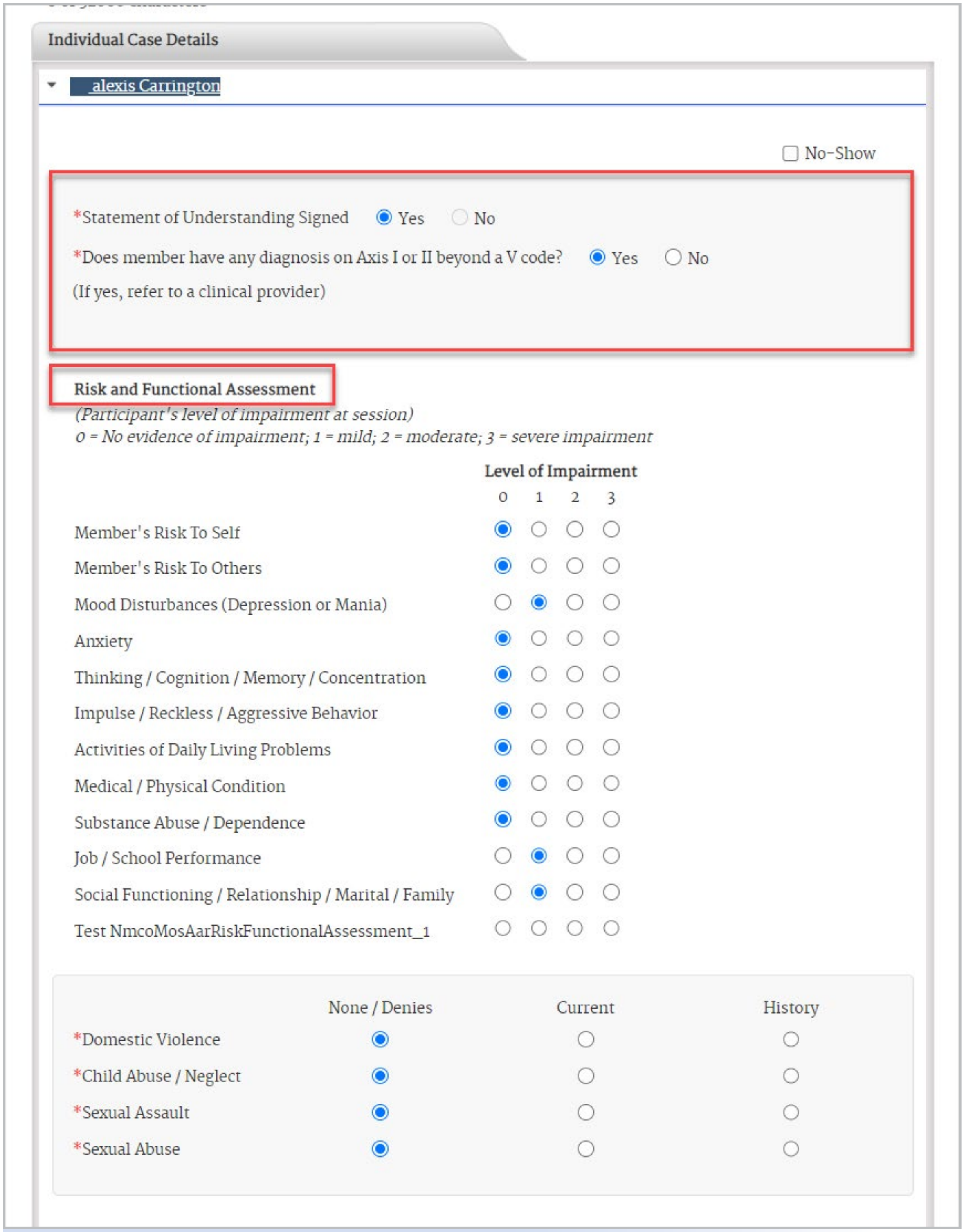
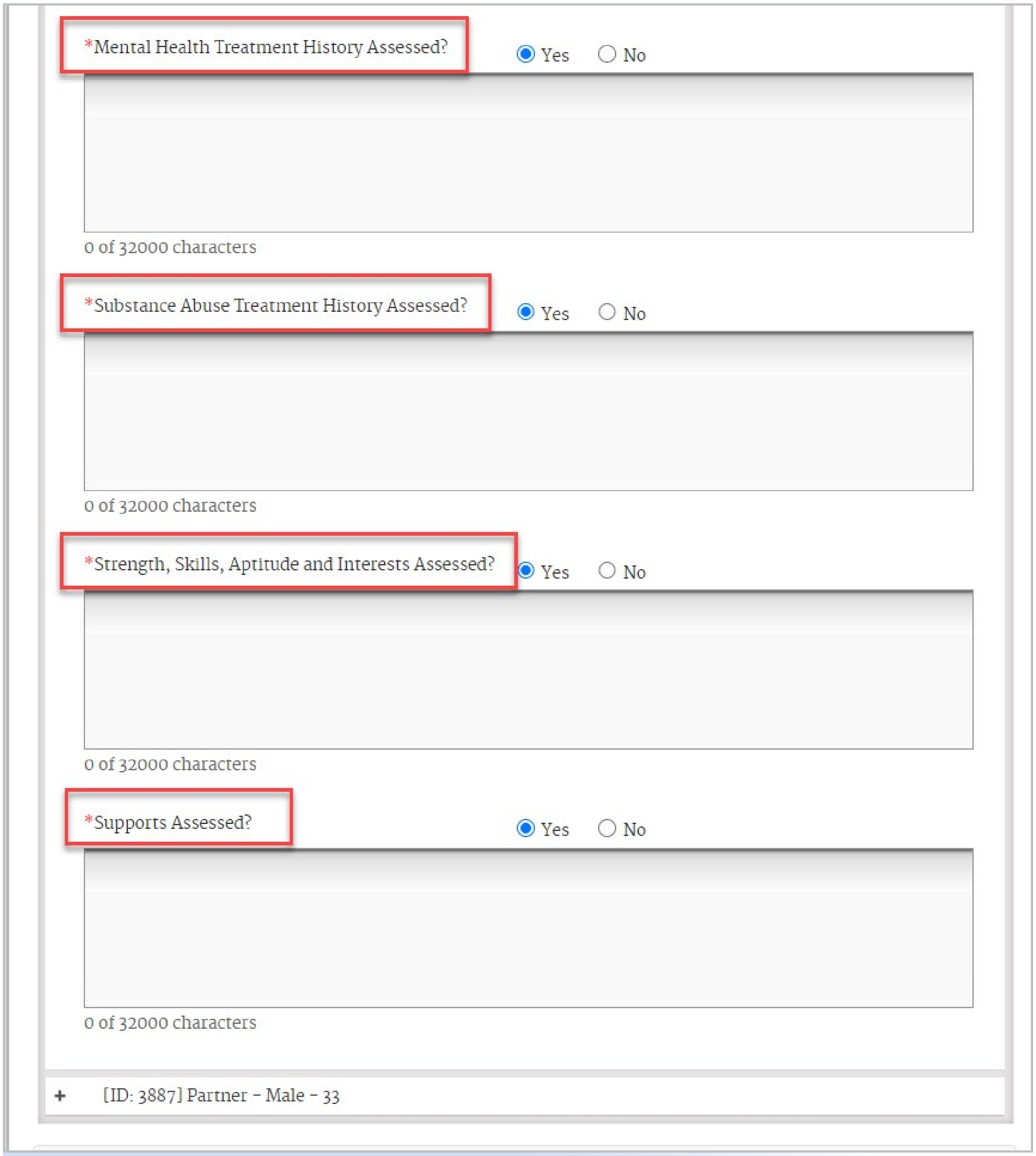


Figure 106

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.

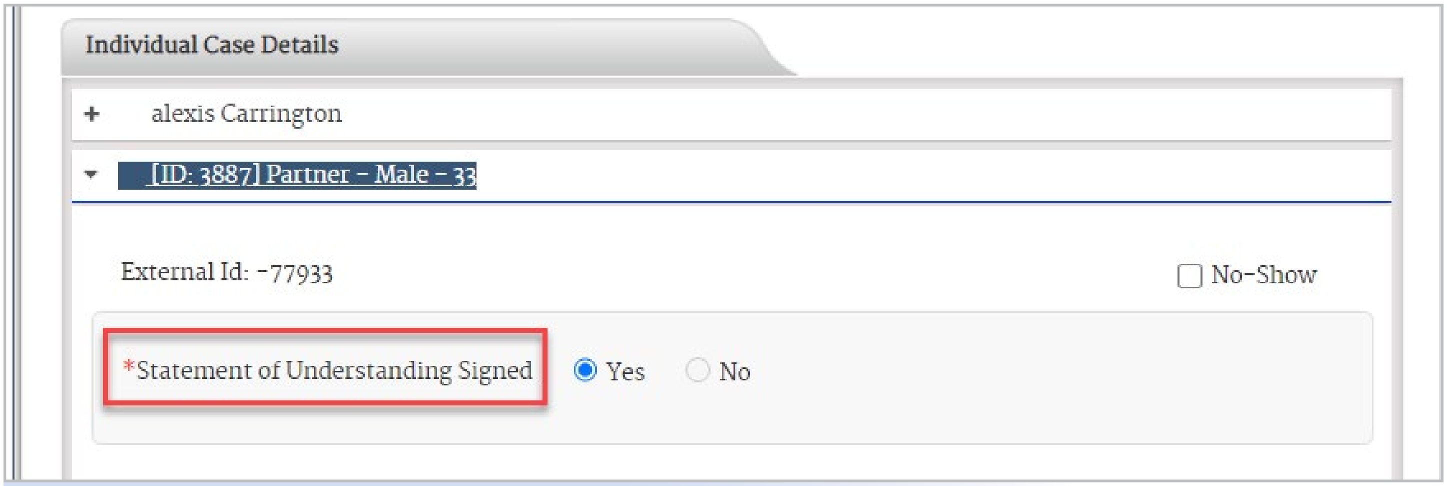


Figure 108

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.

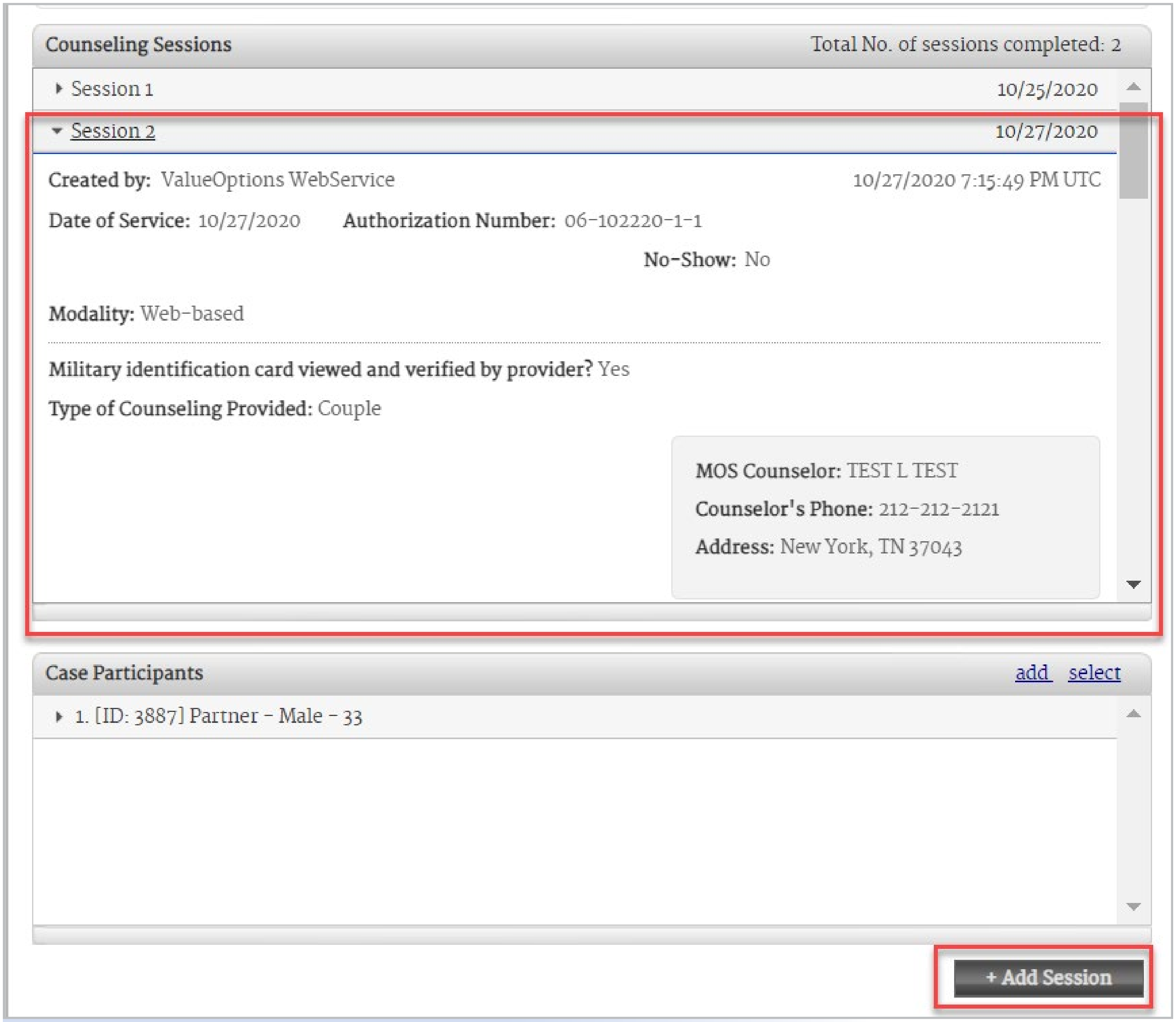


Figure 109

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.

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.

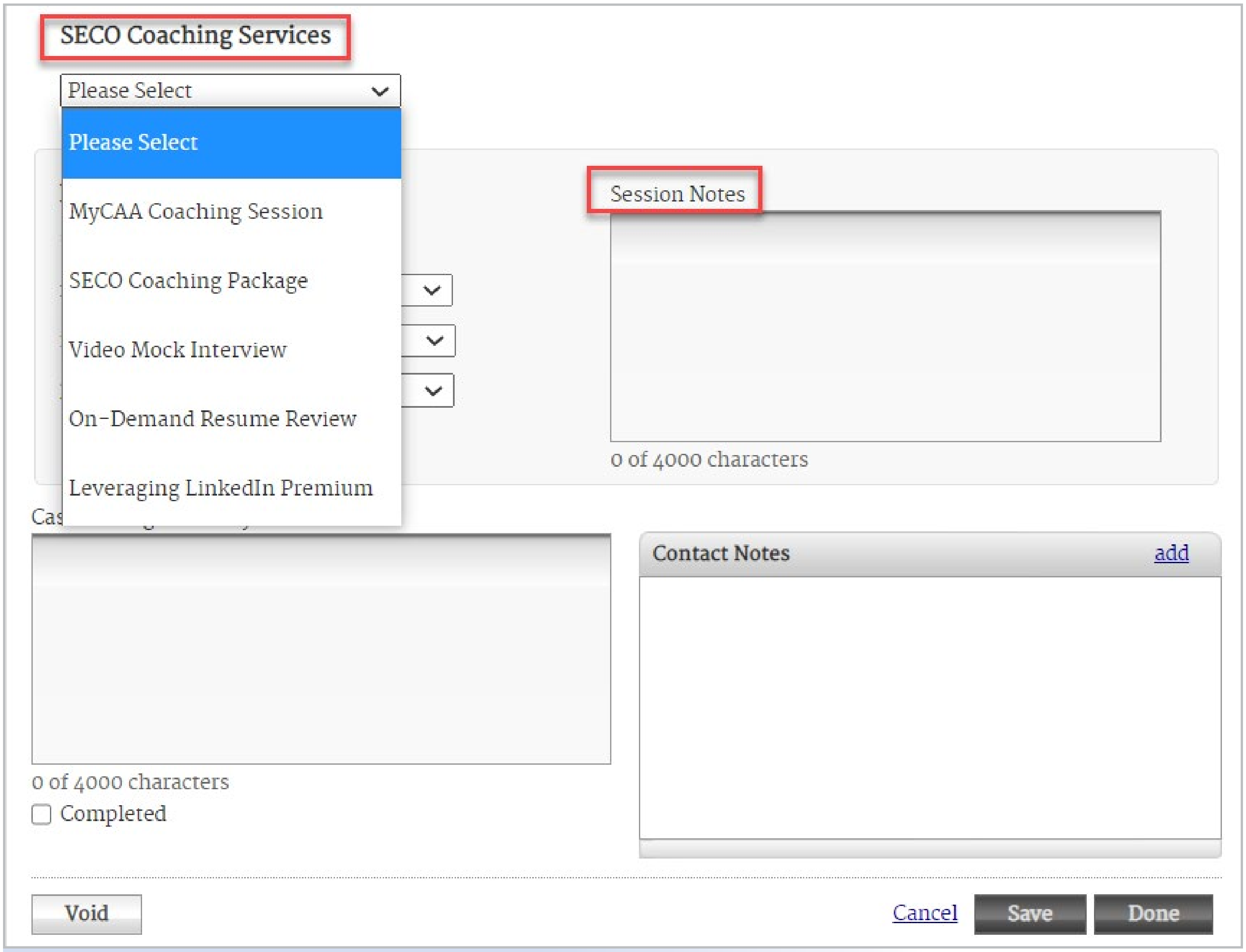


Figure 111

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

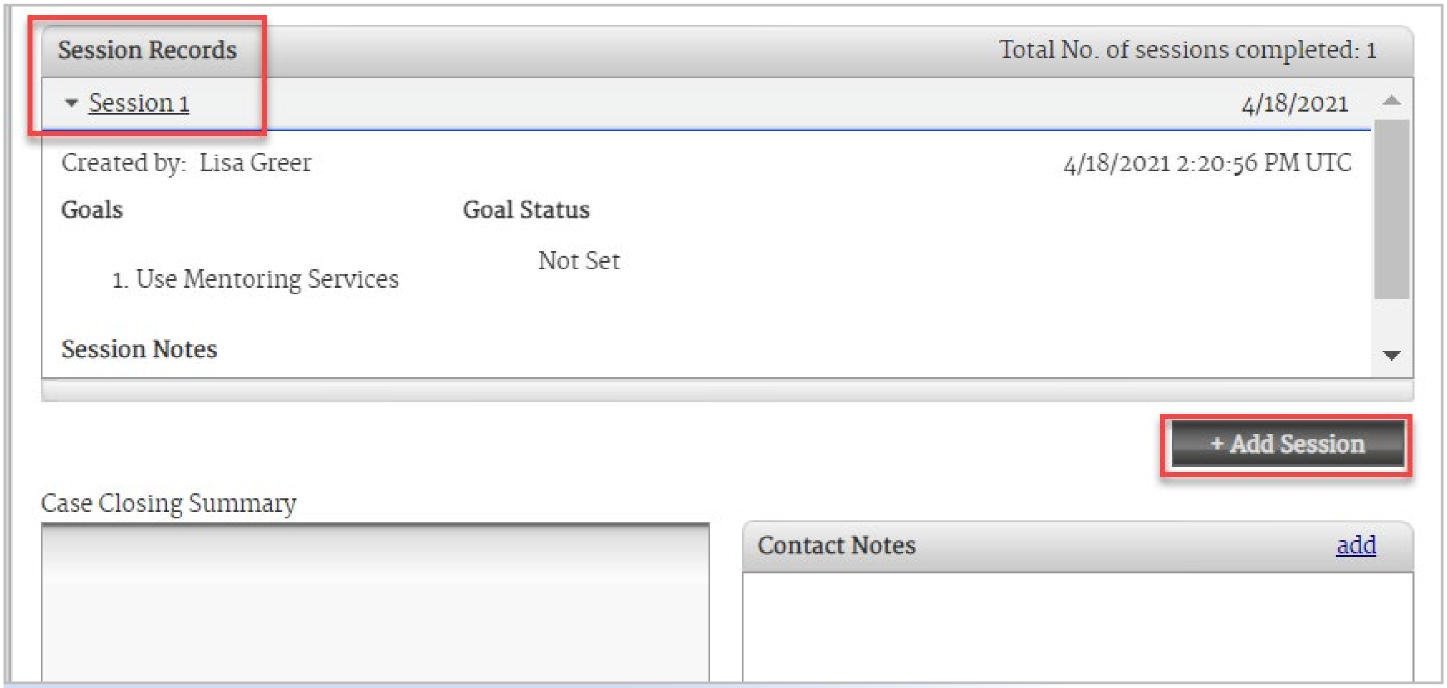


Figure 112

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."

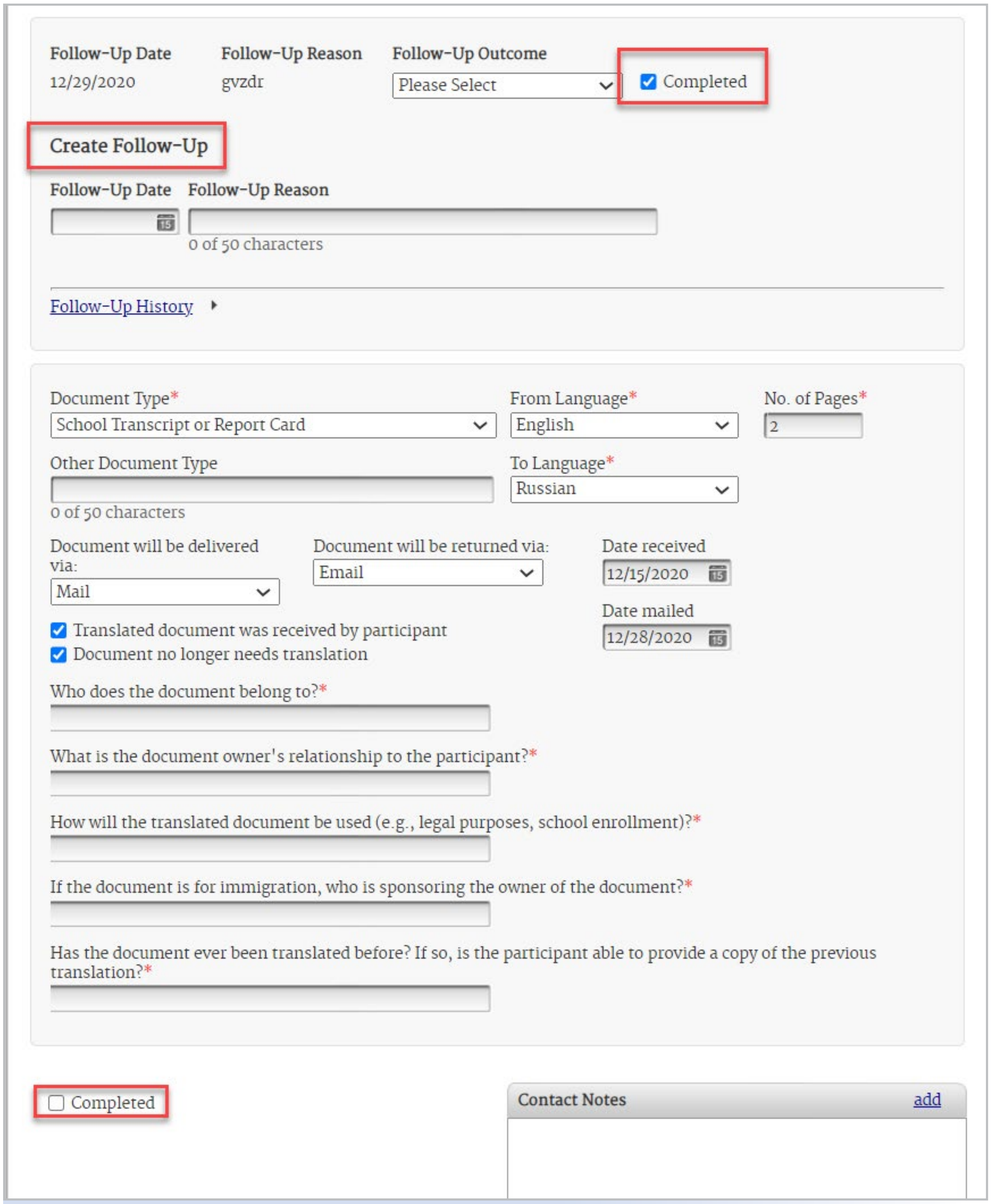


Figure 113

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."

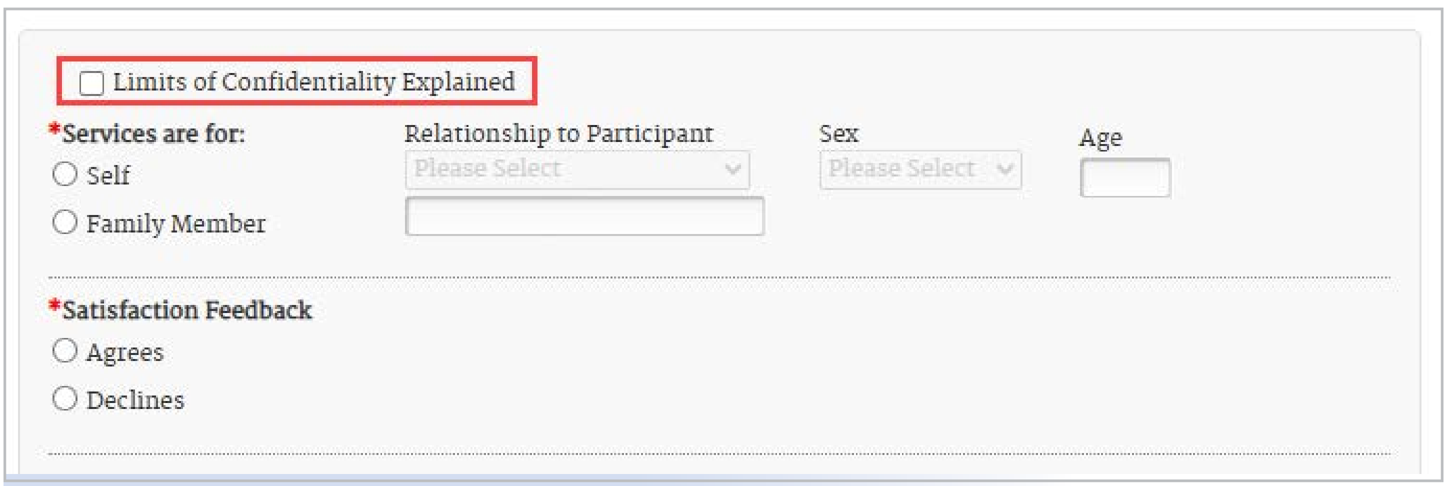


Figure 114

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

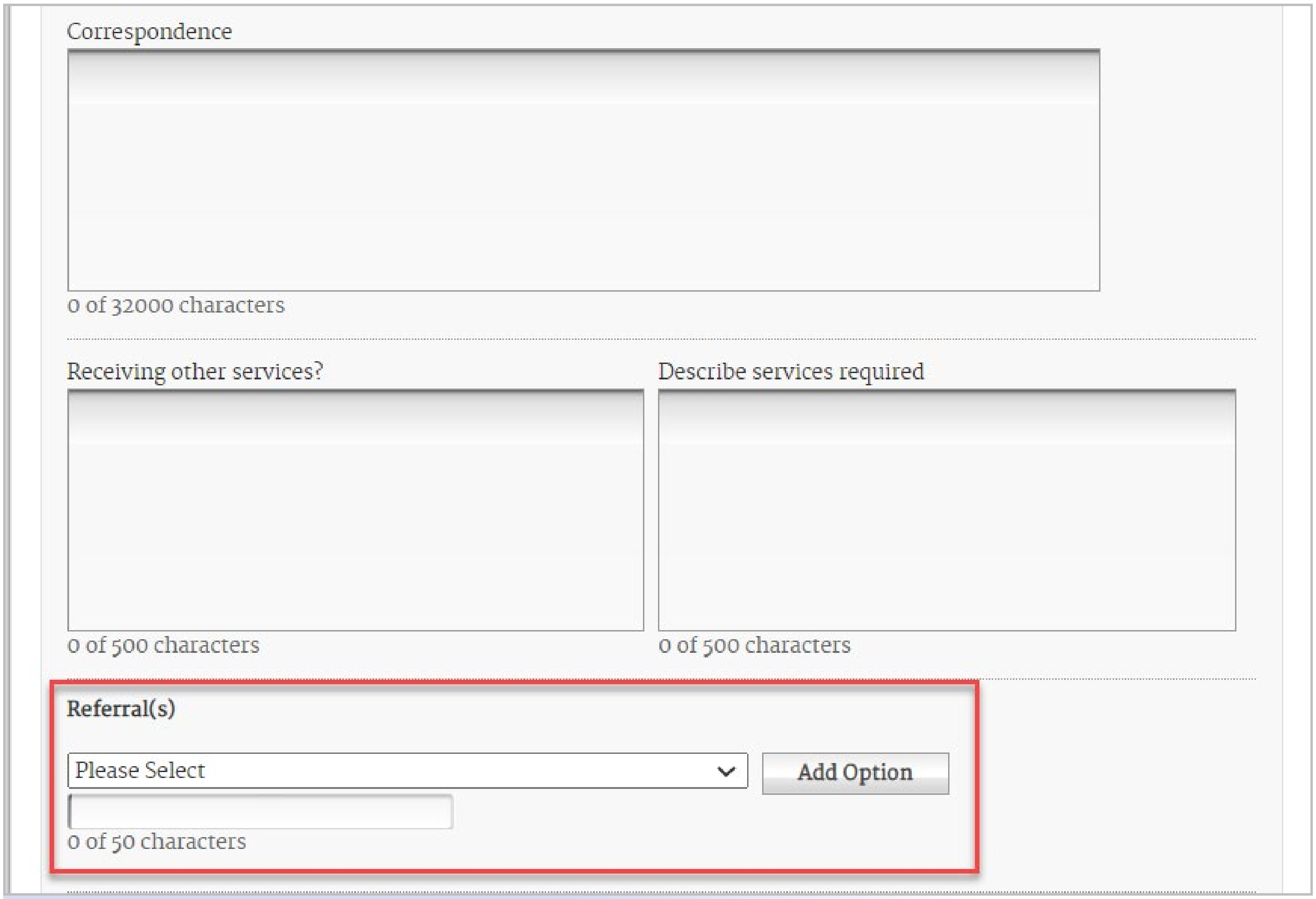


Figure 115

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

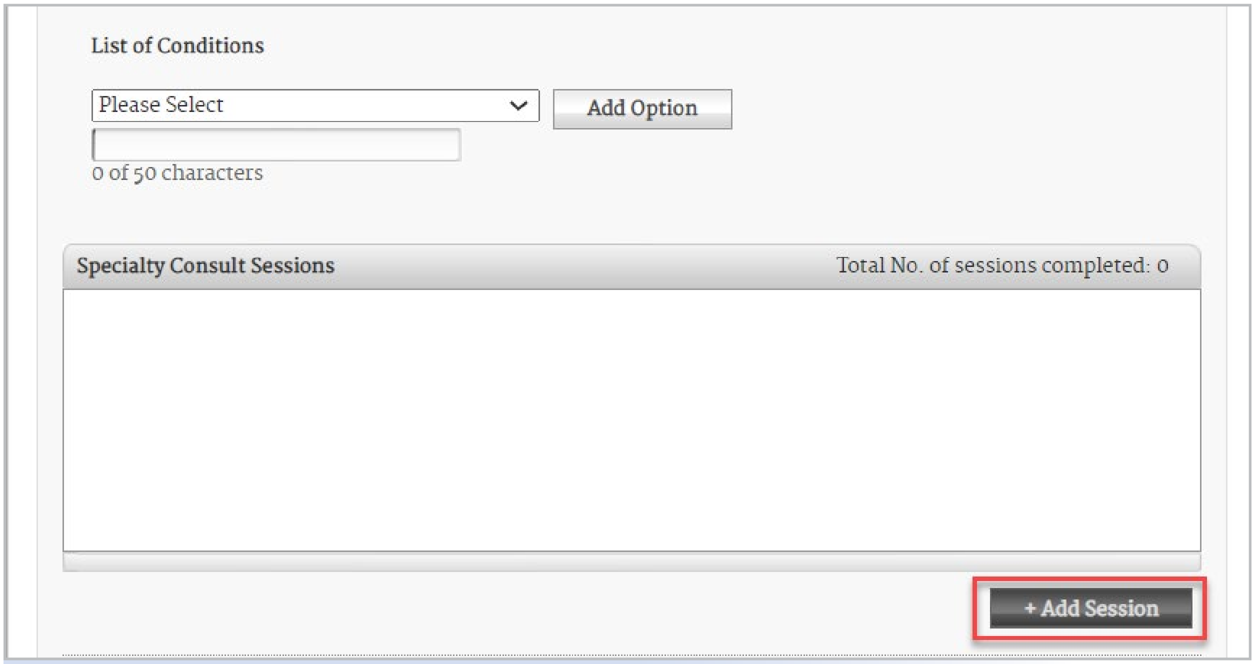


Figure 116

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.

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.

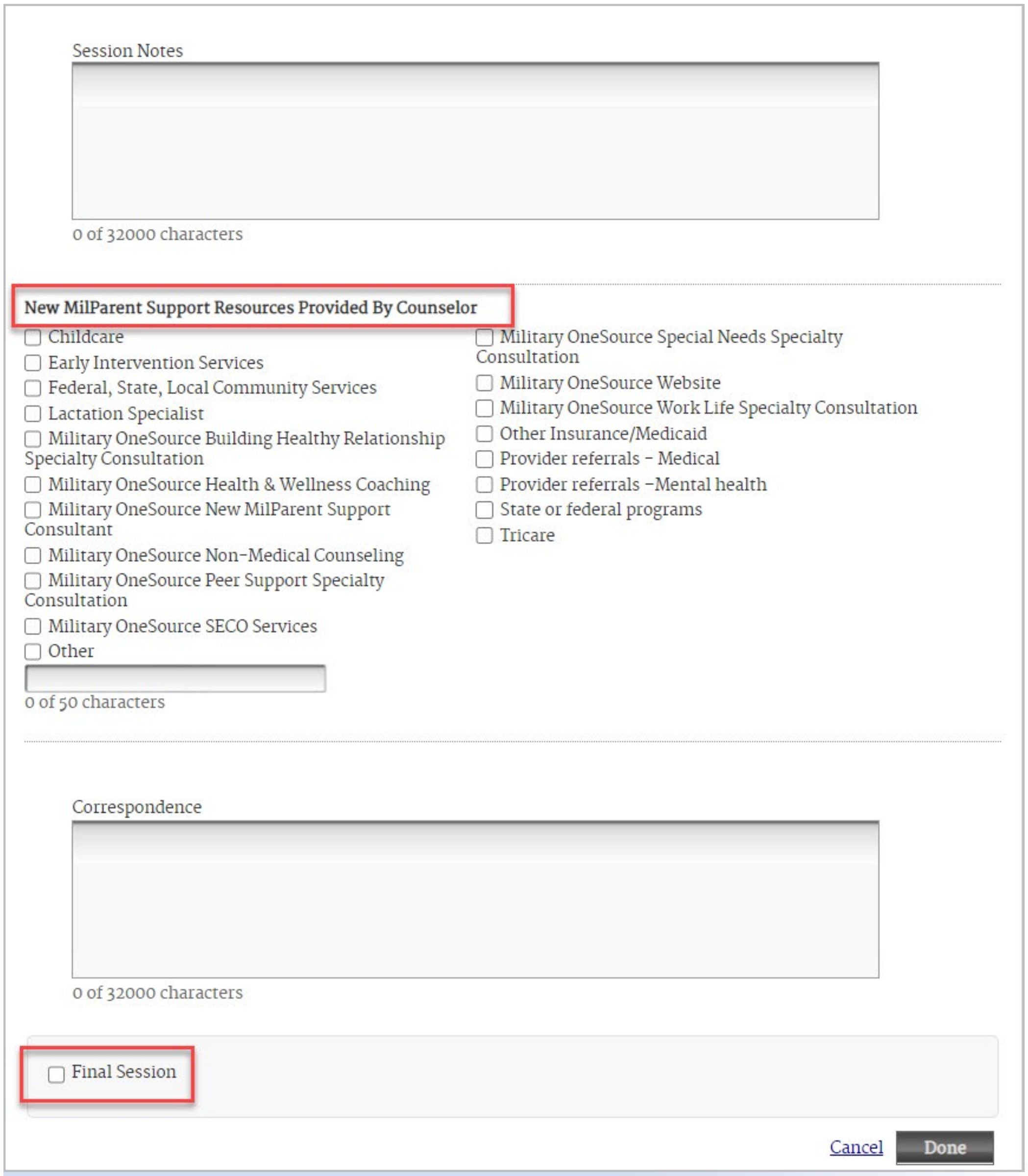


Figure 118

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

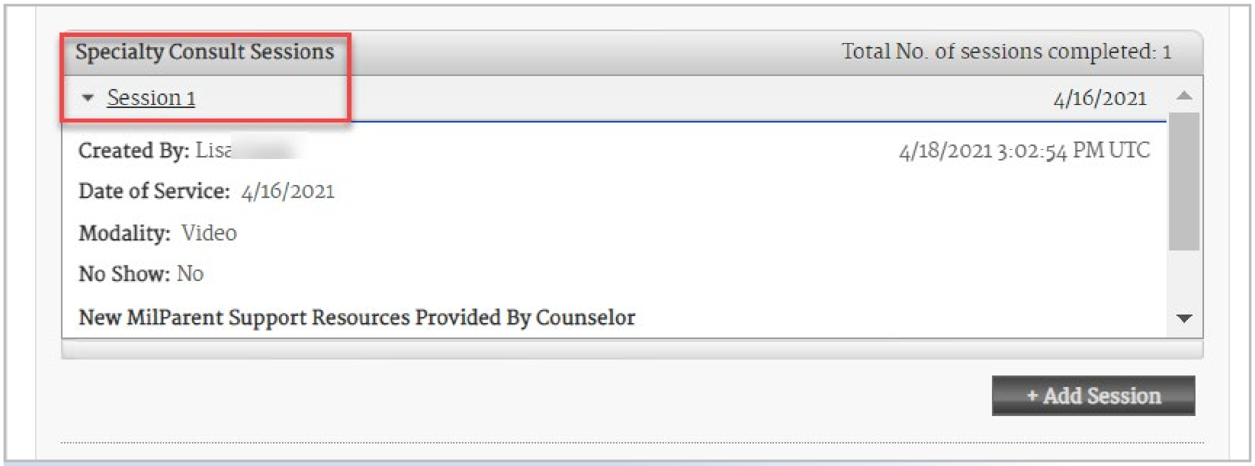


Figure 119

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."

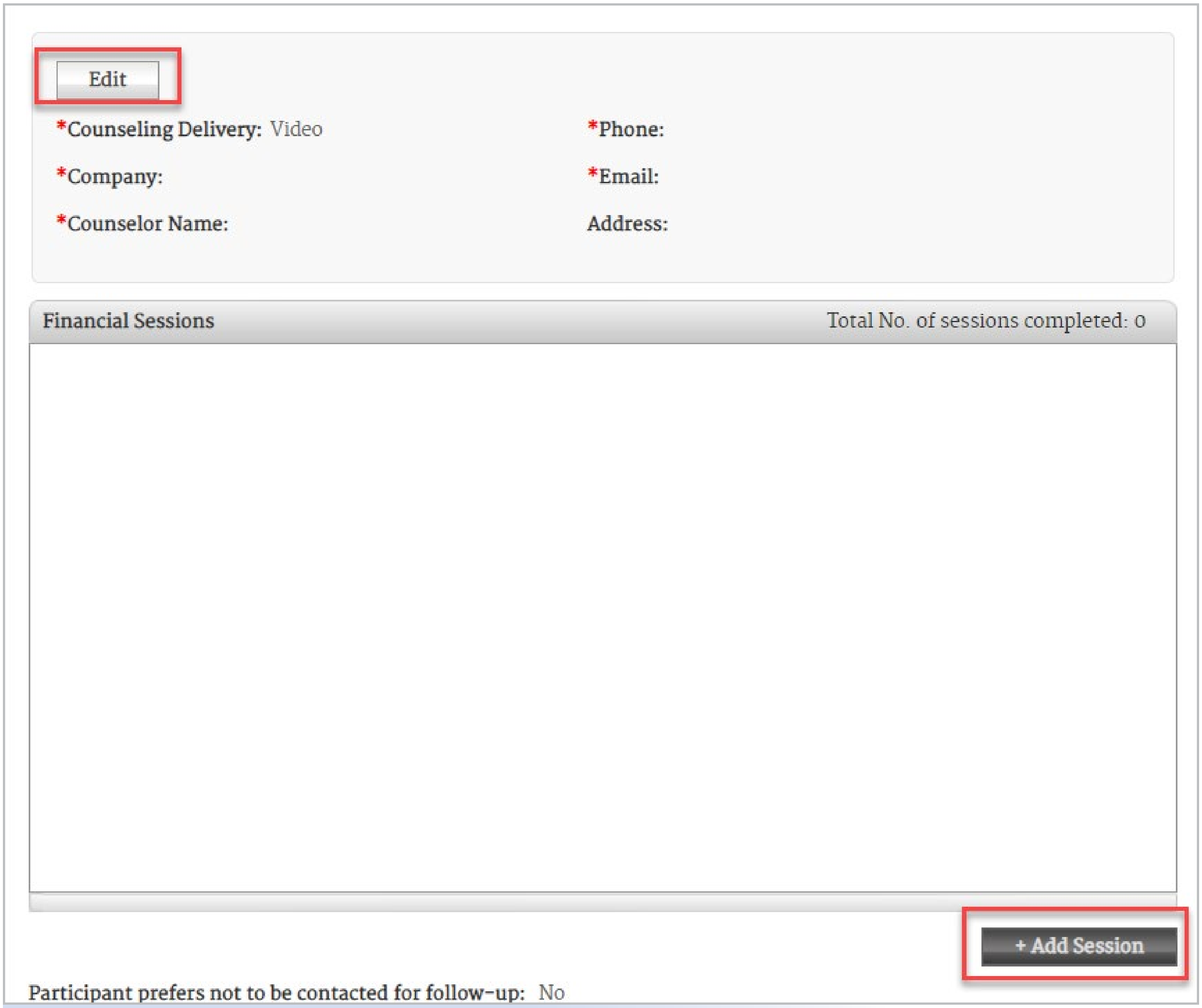

Edit
*Counseling Delivery: Video
*Phone:
*Company:
*Email:
*Counselor Name:
Address:
Financial Sessions
Total No. of sessions completed: 0
+ Add Session
Participant prefers not to be contacted for follow-up: No

Figure 120

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.

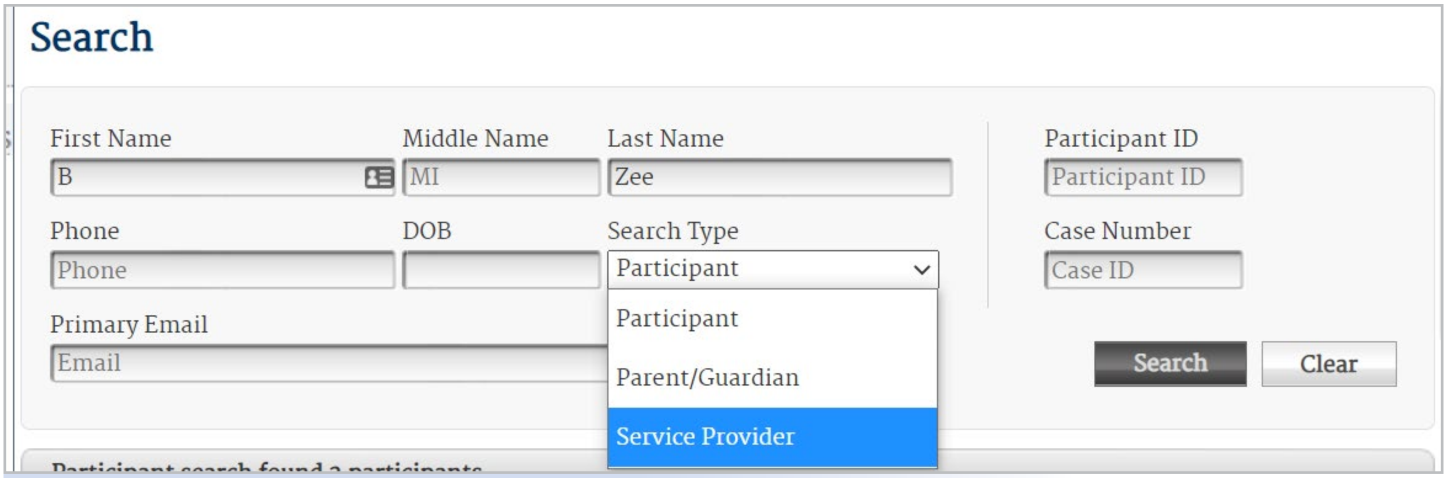


Figure 121

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

- [ ] Auto Loan
- [x] Budgeting
- [ ] Consolidation
- [ ] Consumer Rights
- [ ] Credit Cards
- [ ] Debt / Financial
- [ ] Education
- [ ] Estate Planning
- [ ] Financial Assistance
- [ ] Financial Hardship
- [ ] Foreclosure
- [ ] Home Loan
- [ ] Identity Theft Information
- [ ] Identity Theft Prevention
- [ ] Identity Theft Recovery
- [ ] Insurance
- [ ] Investments
- [ ] Planning for Deployment
- [ ] Purchasing a Home
- [ ] Refinance Loan
- [ ] Retirement
- [ ] Savings
- [ ] Tax
- [ ] TSP
- [ ] Other
- [ ] Blended Retirement System
- [ ] Credit Reports
- [ ] Student Loans
- [ ] Divorce

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 Done

Figure 122

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

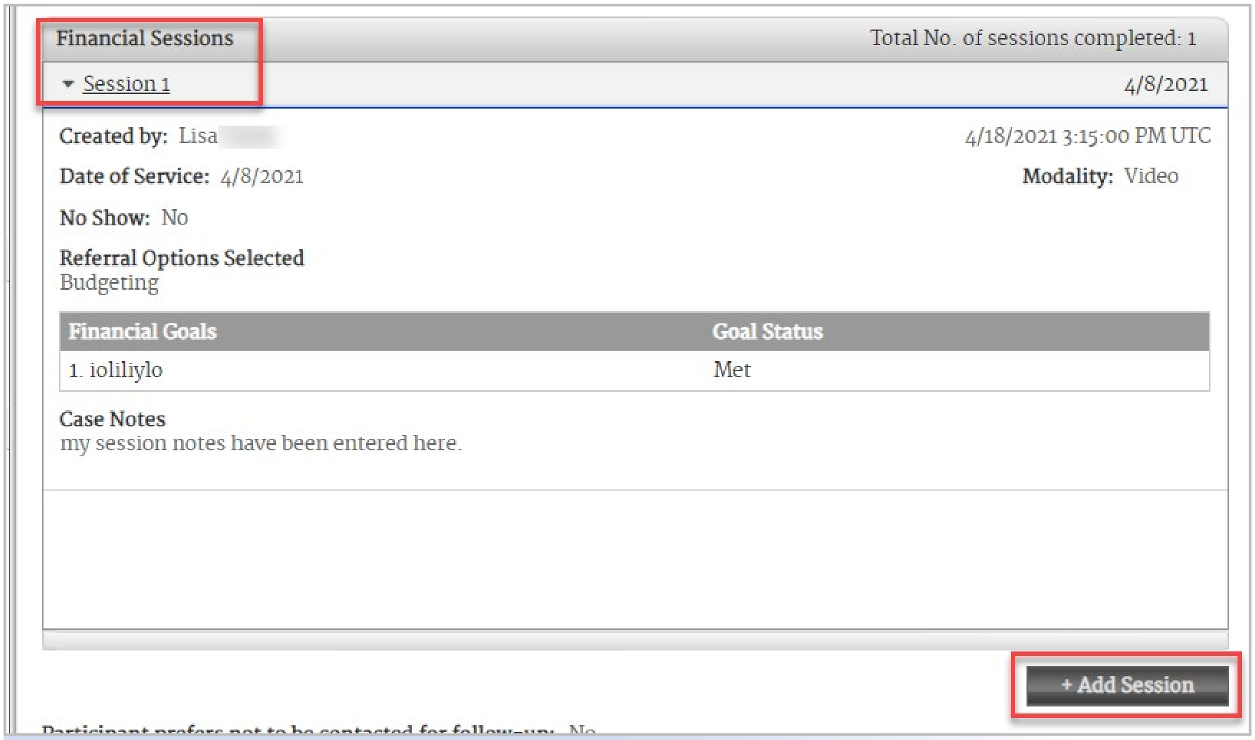


Figure 123

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.

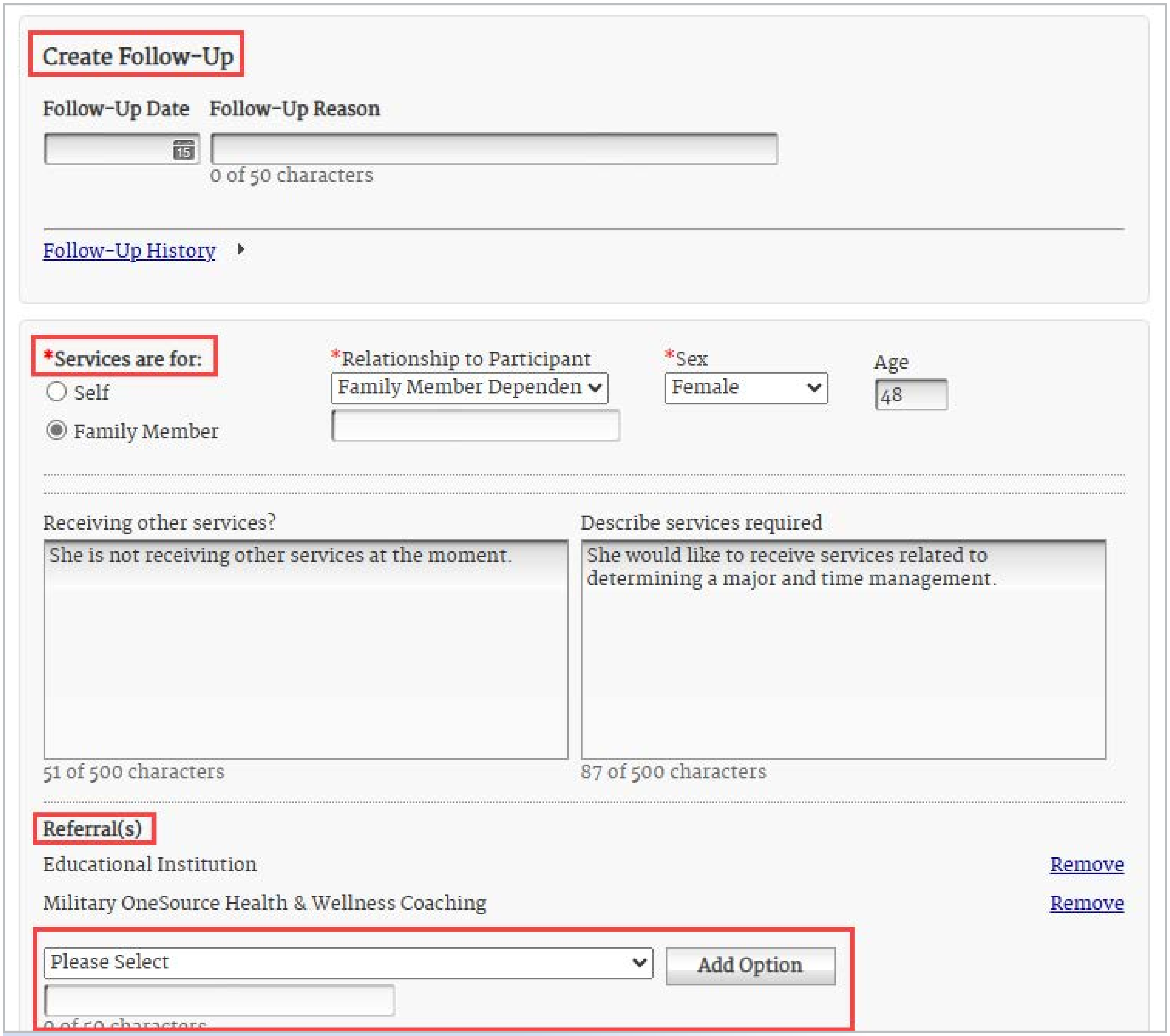


Figure 124

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.”

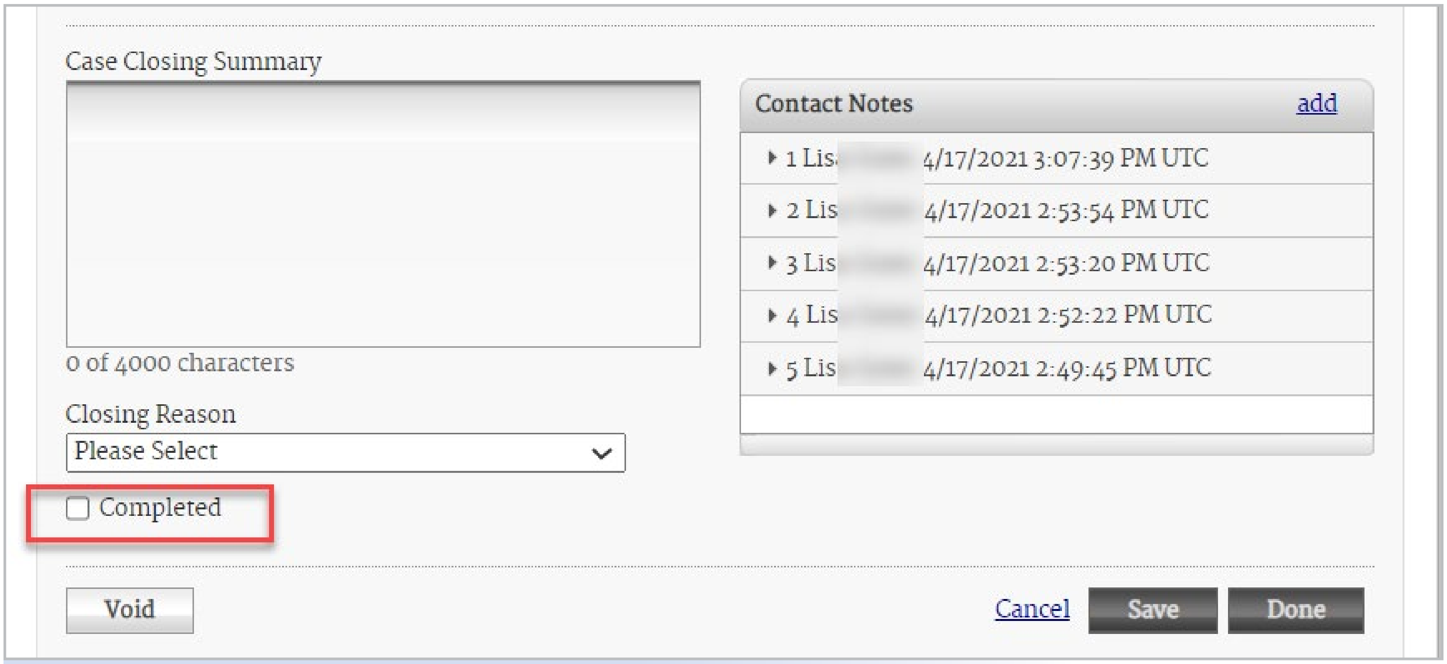


Figure 125

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.

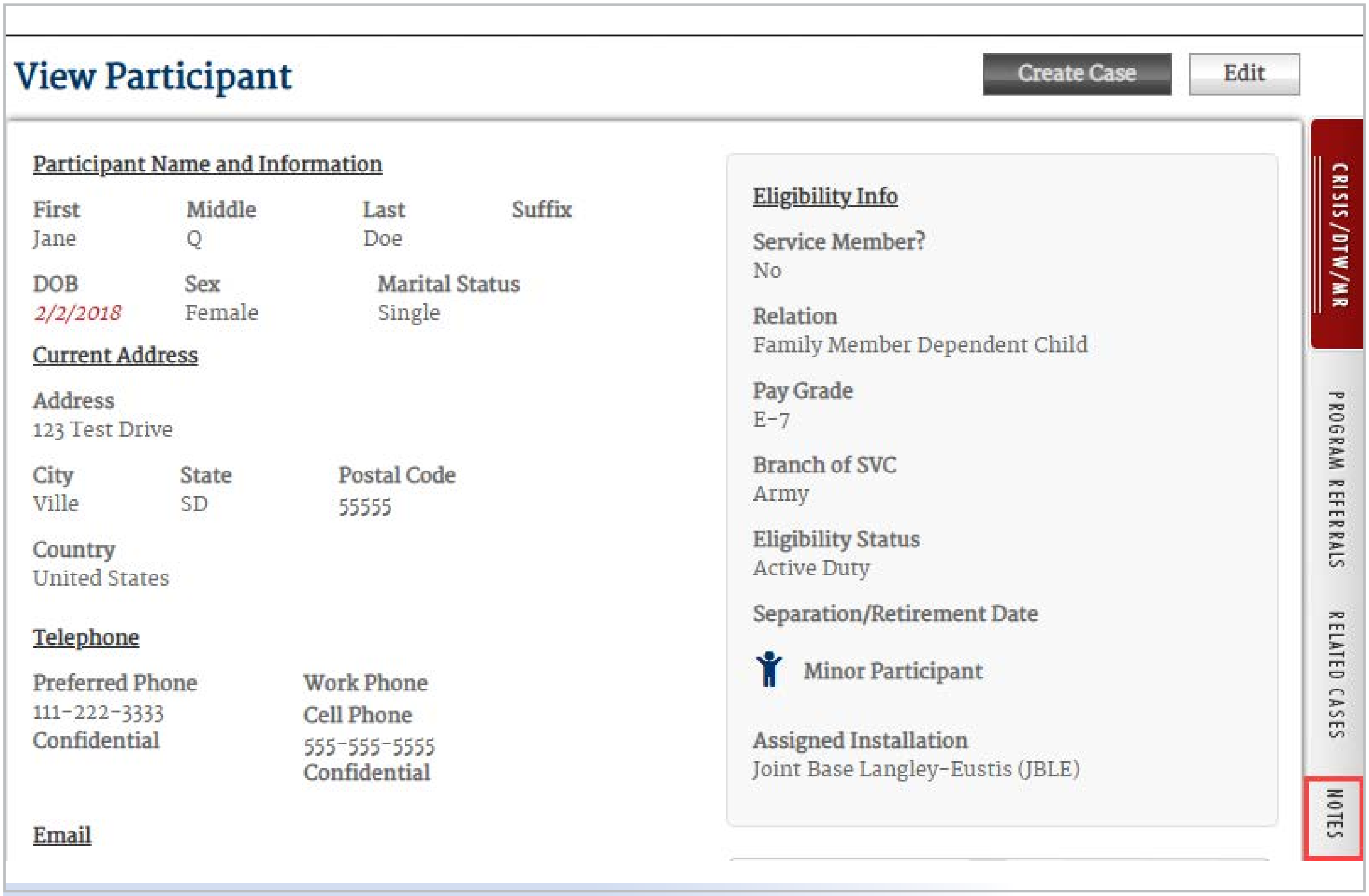


Figure 126

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.

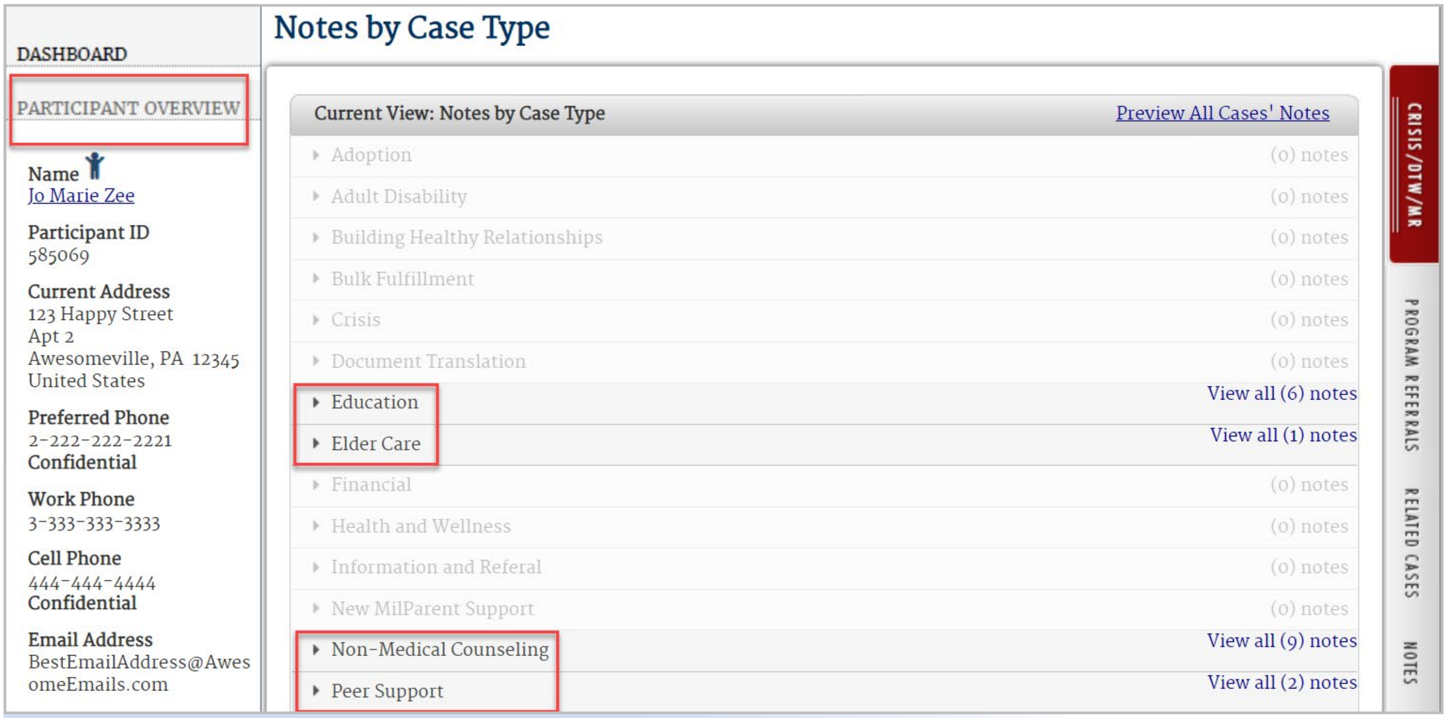


Figure 127

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.

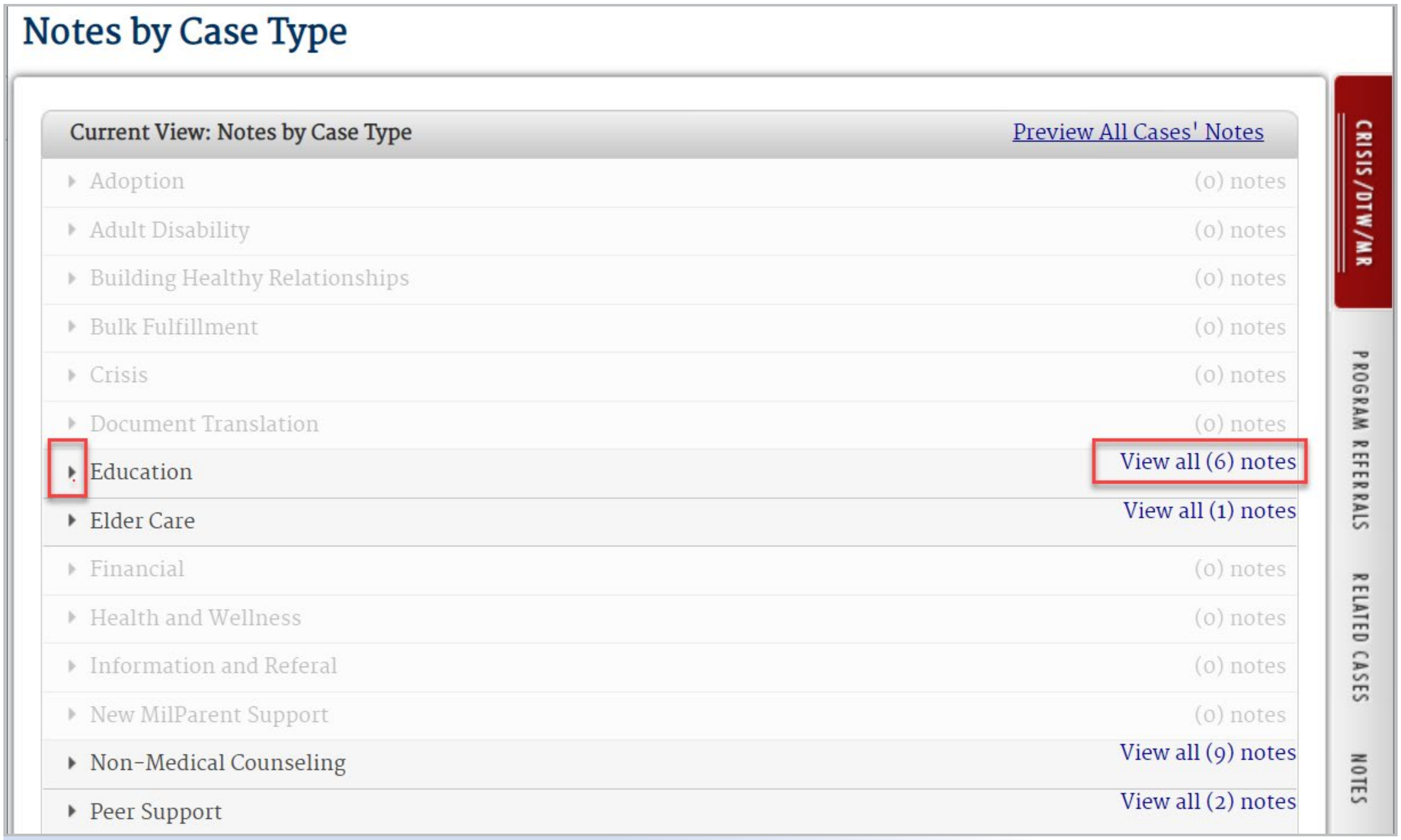


Figure 128

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.

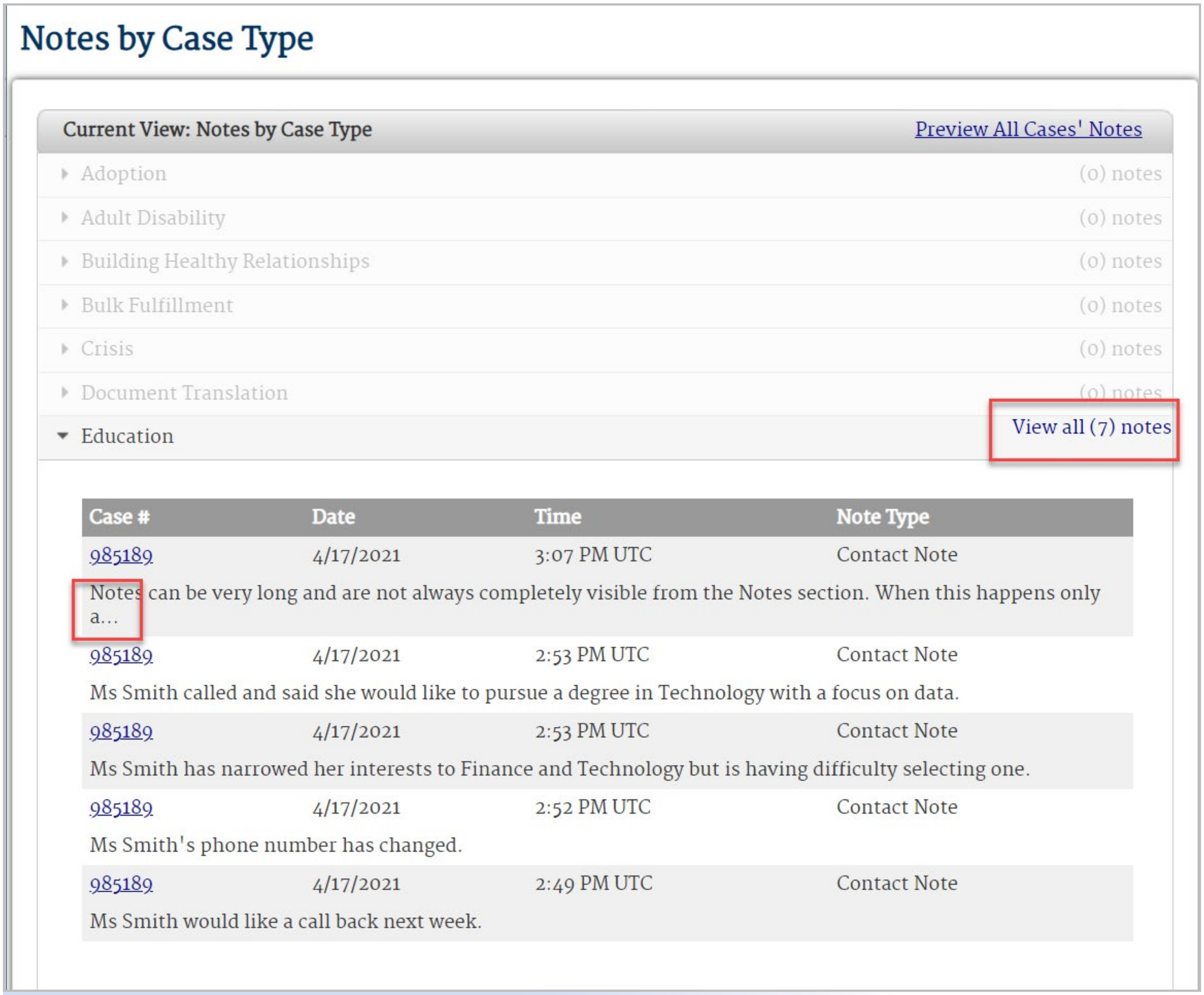


Figure 129

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.

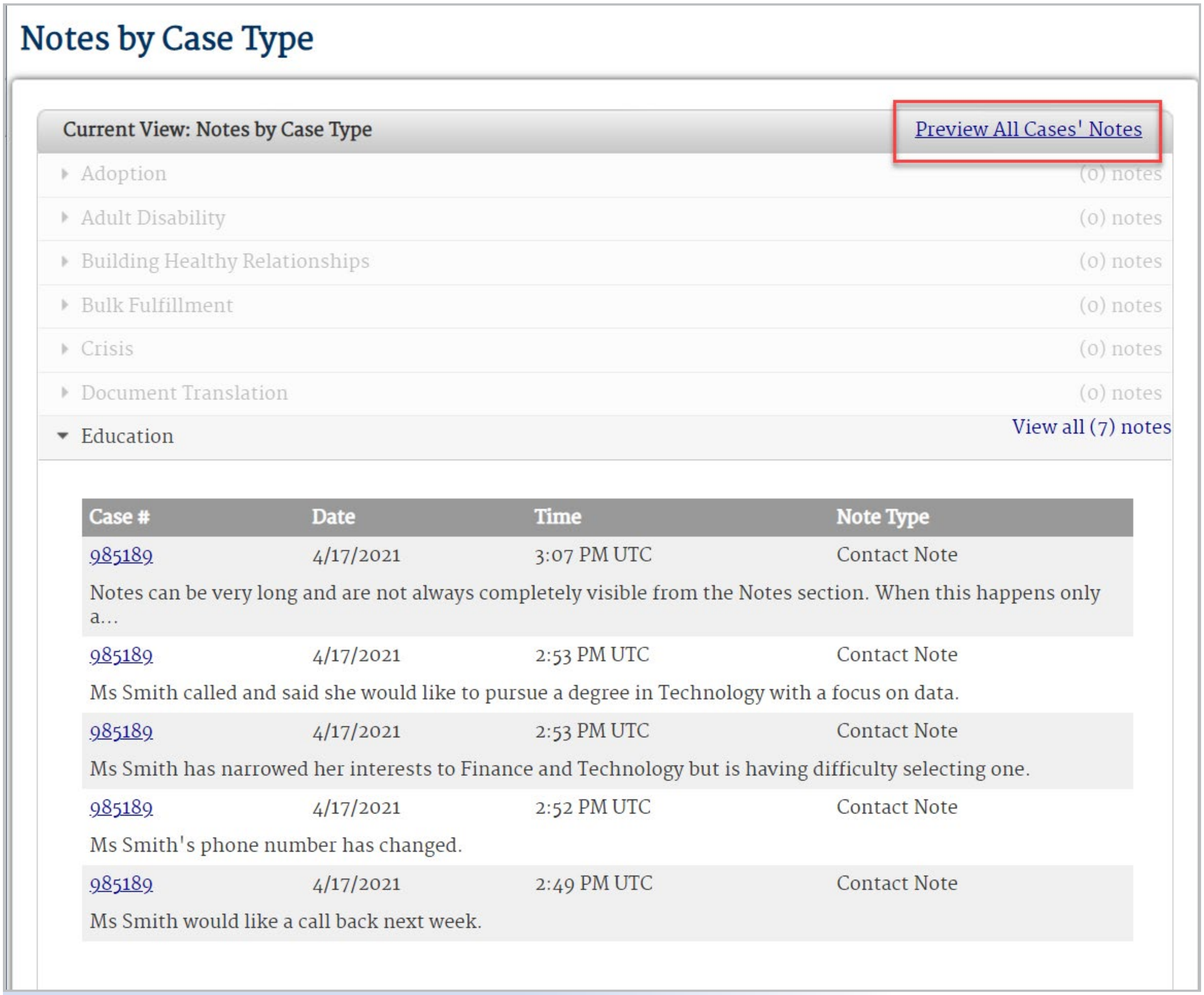
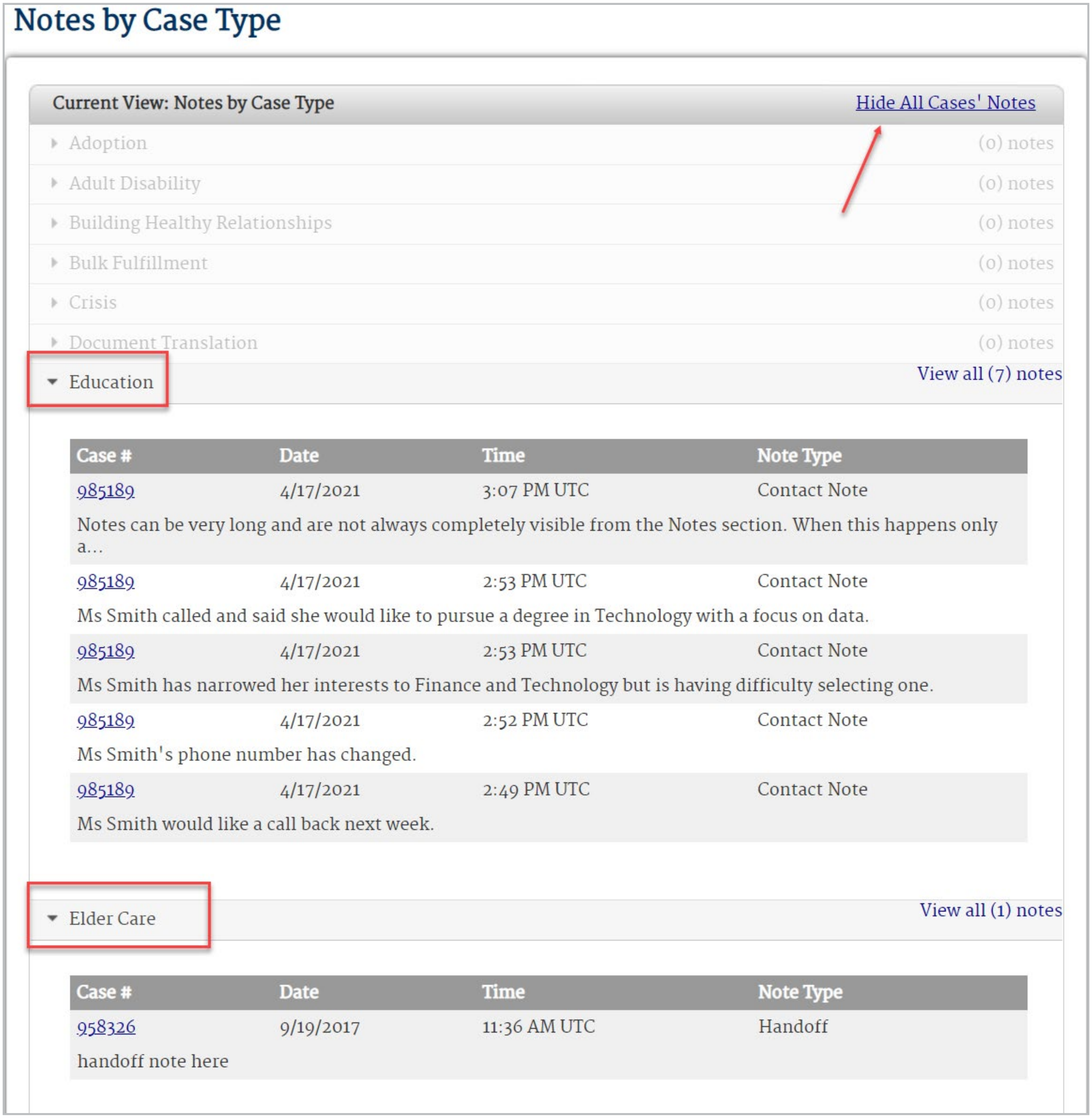


Figure 131

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



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.

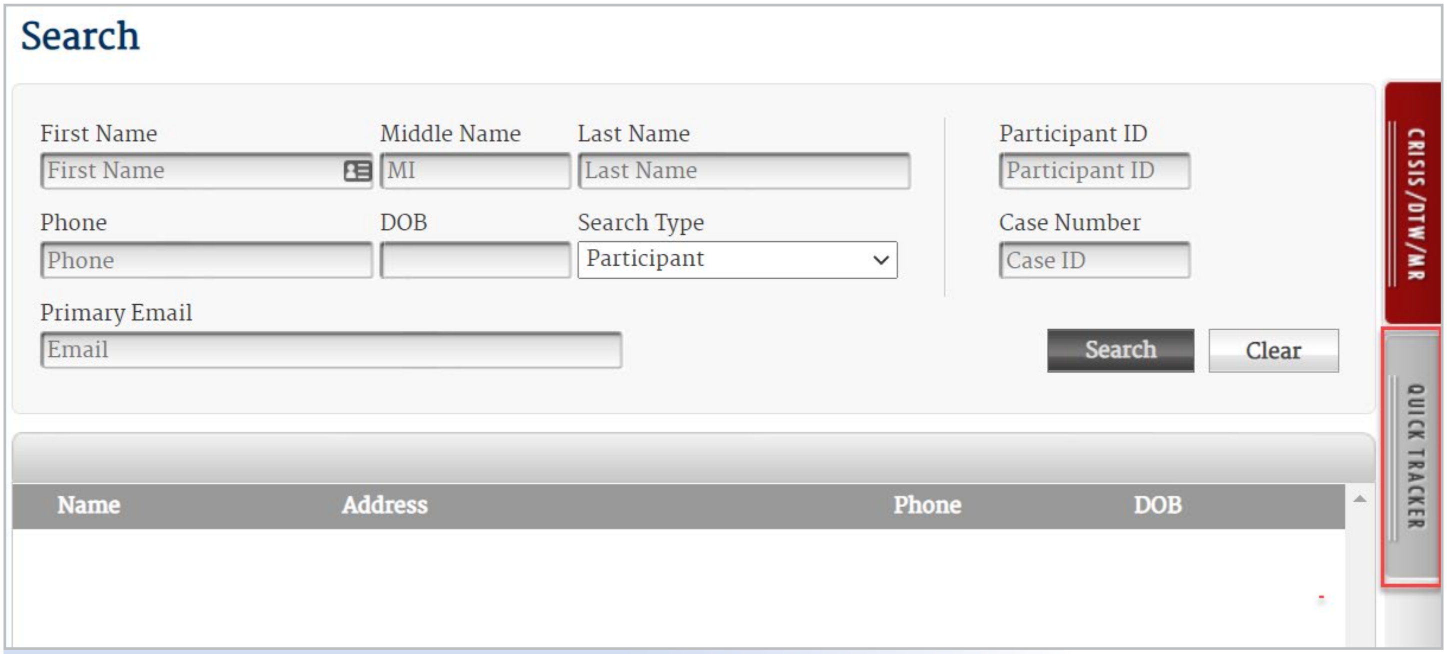


Figure 132

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

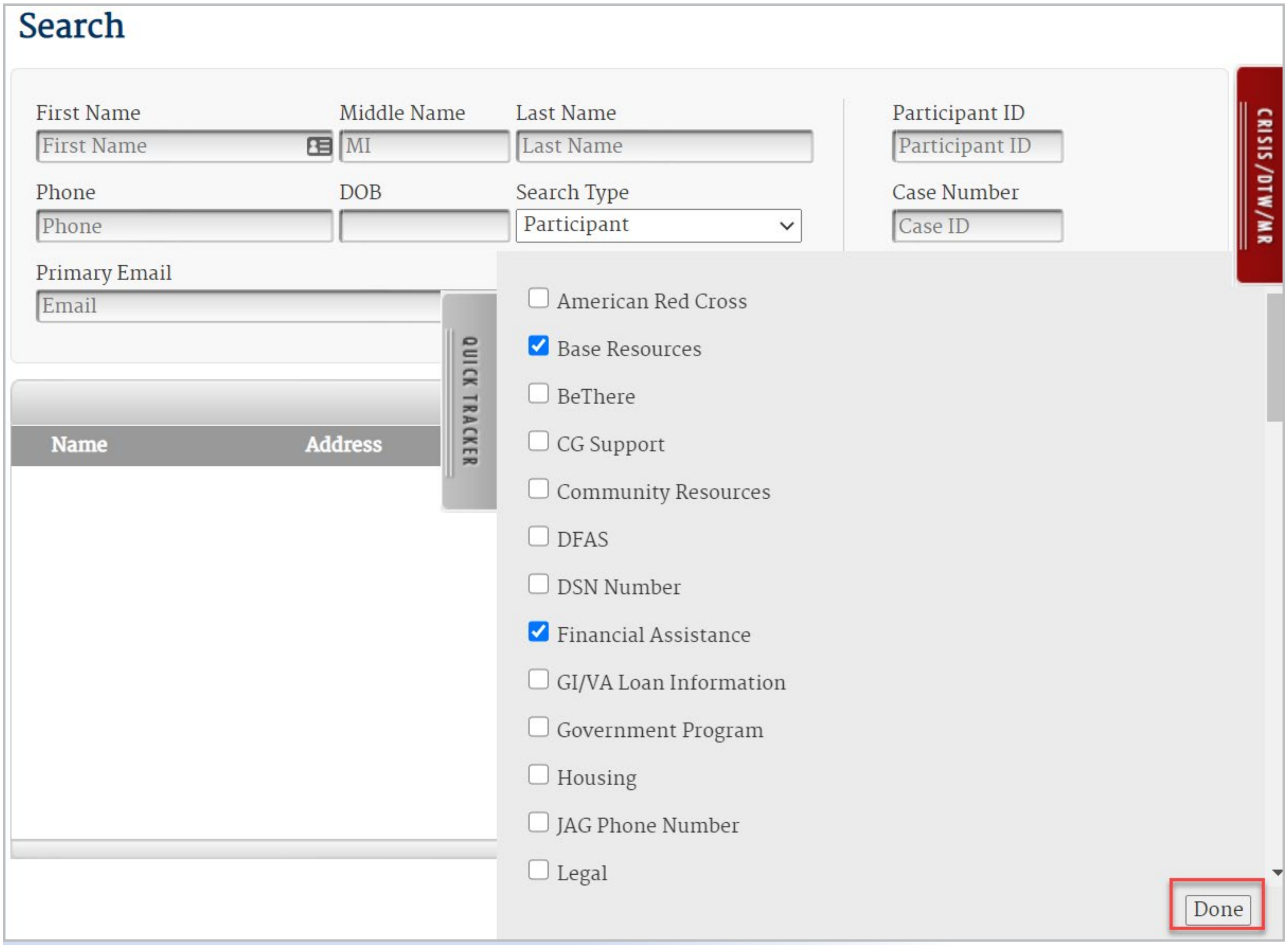


Figure 133

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.

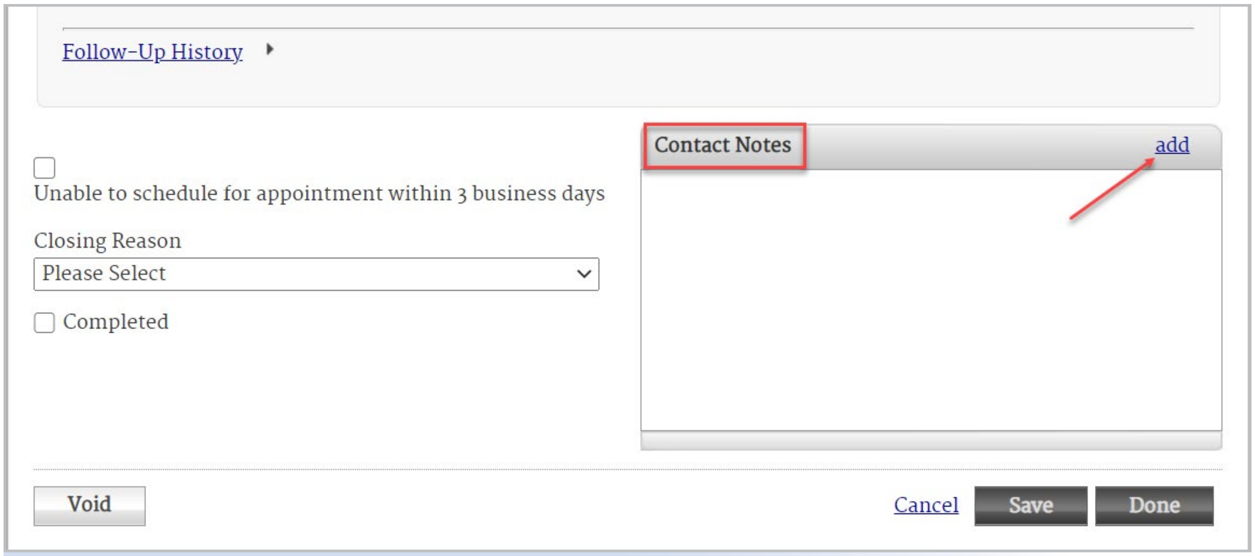


Figure 134

When finished entering your note, select "Done."

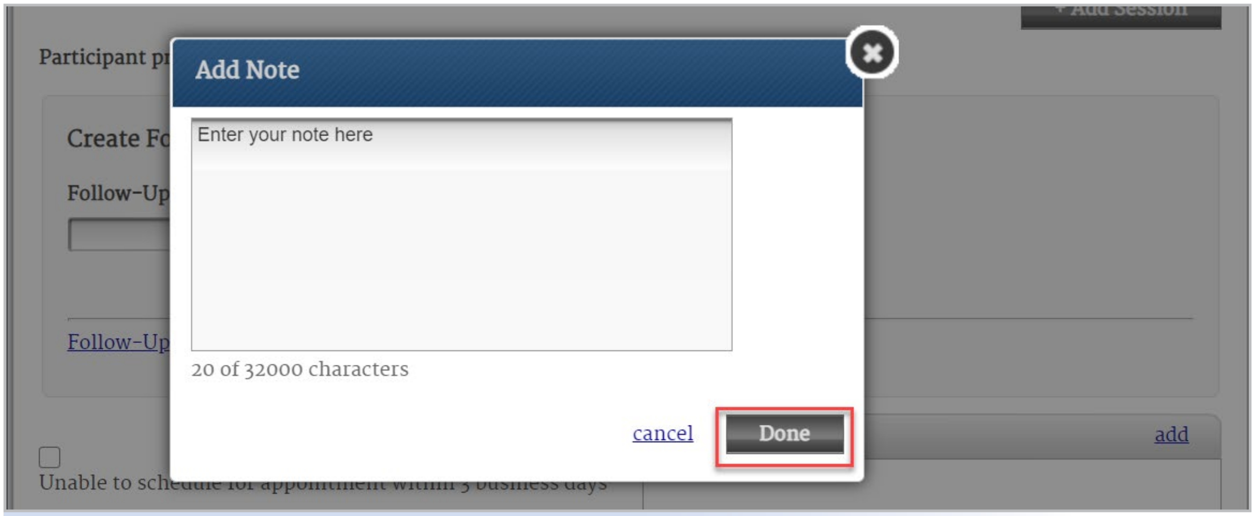


Figure 135

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

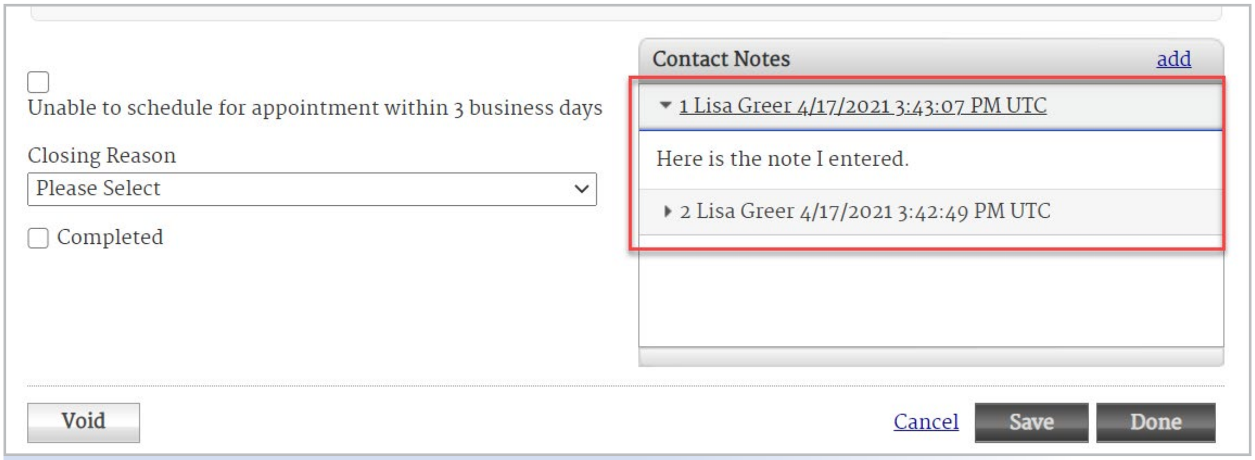


Figure 136

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.

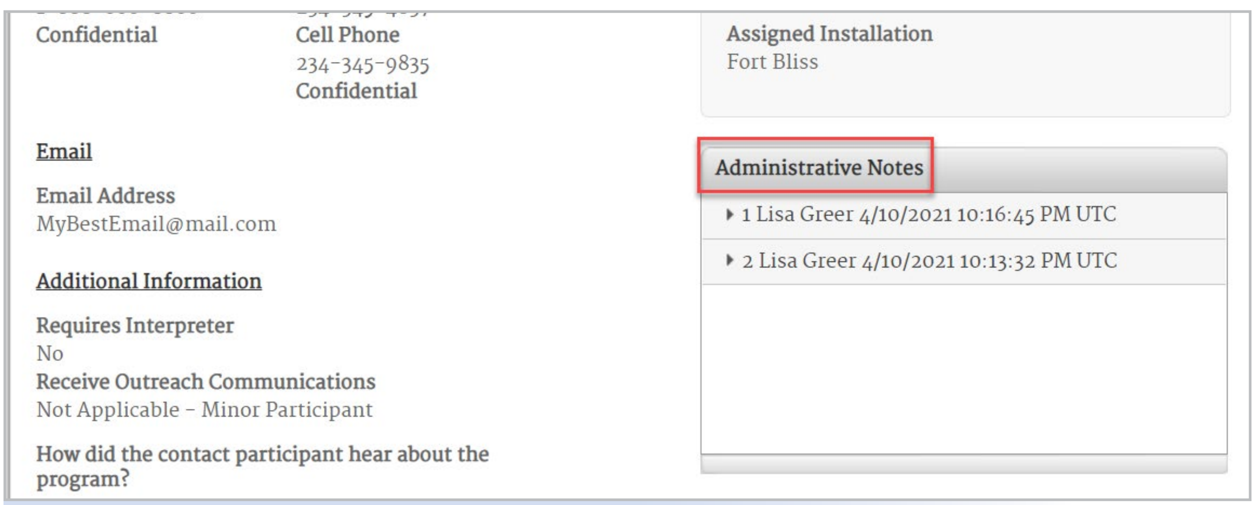


Figure 137

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.

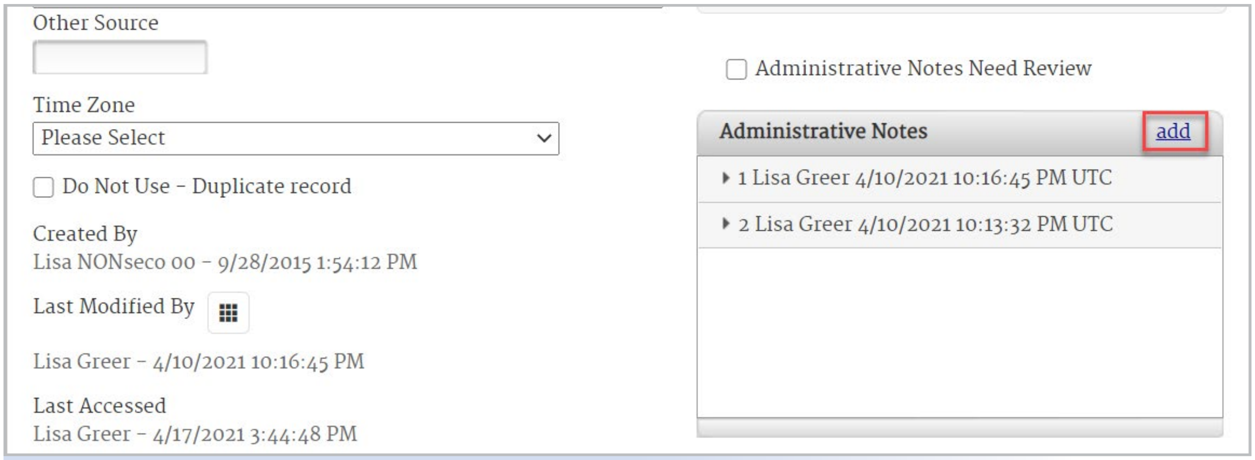


Figure 138

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

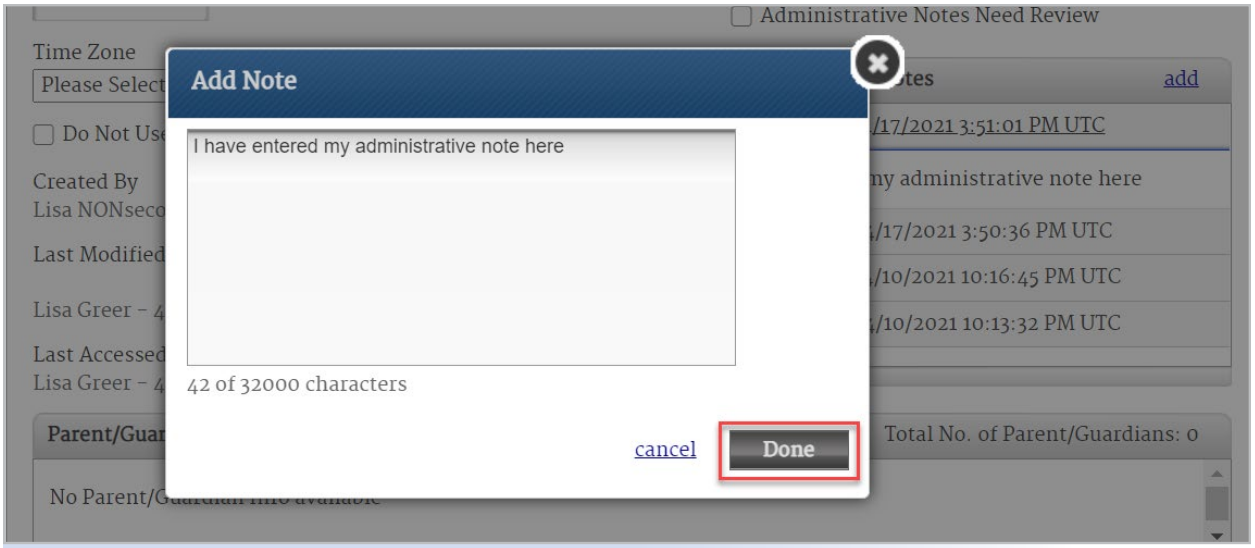


Figure 139

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

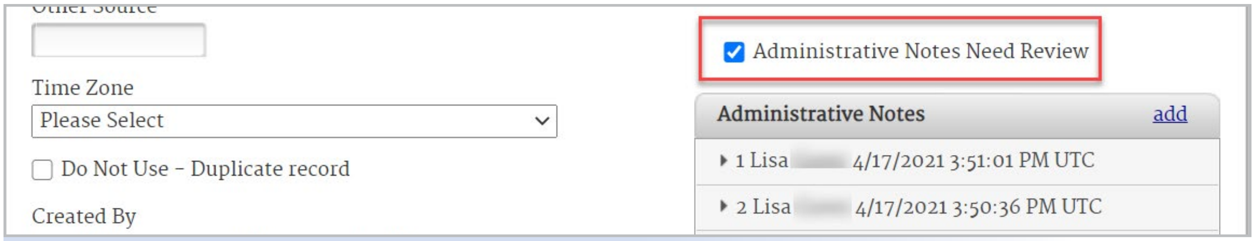


Figure 140

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.

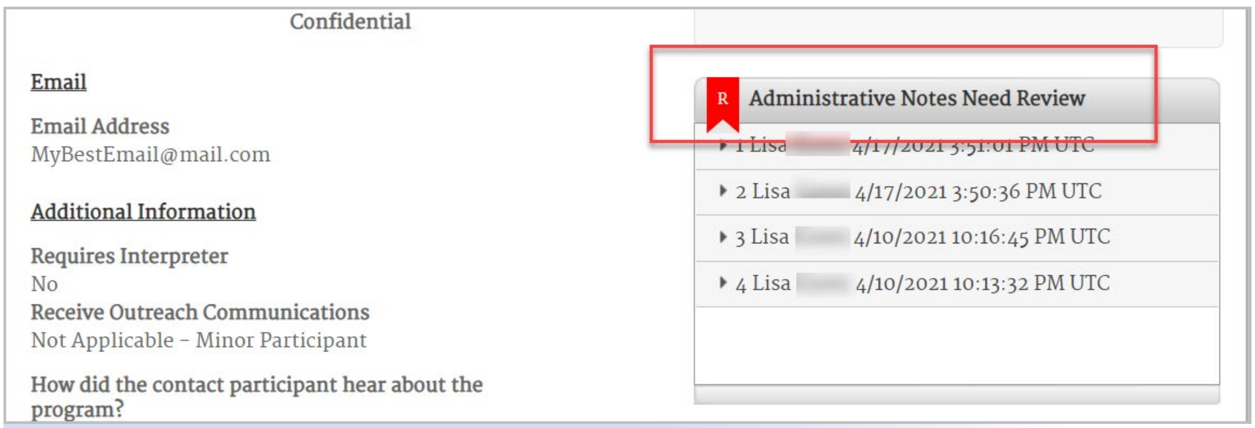


Figure 141

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 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

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.

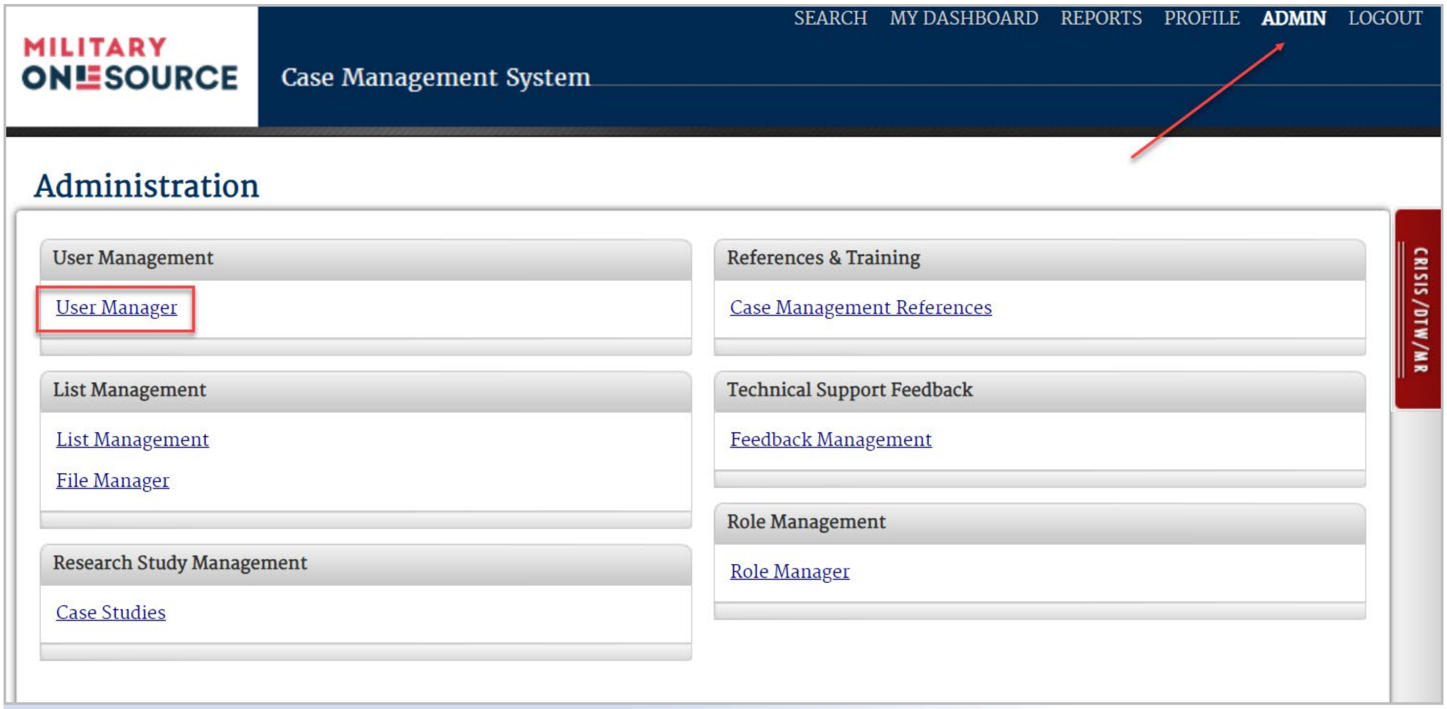


Figure 143

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.

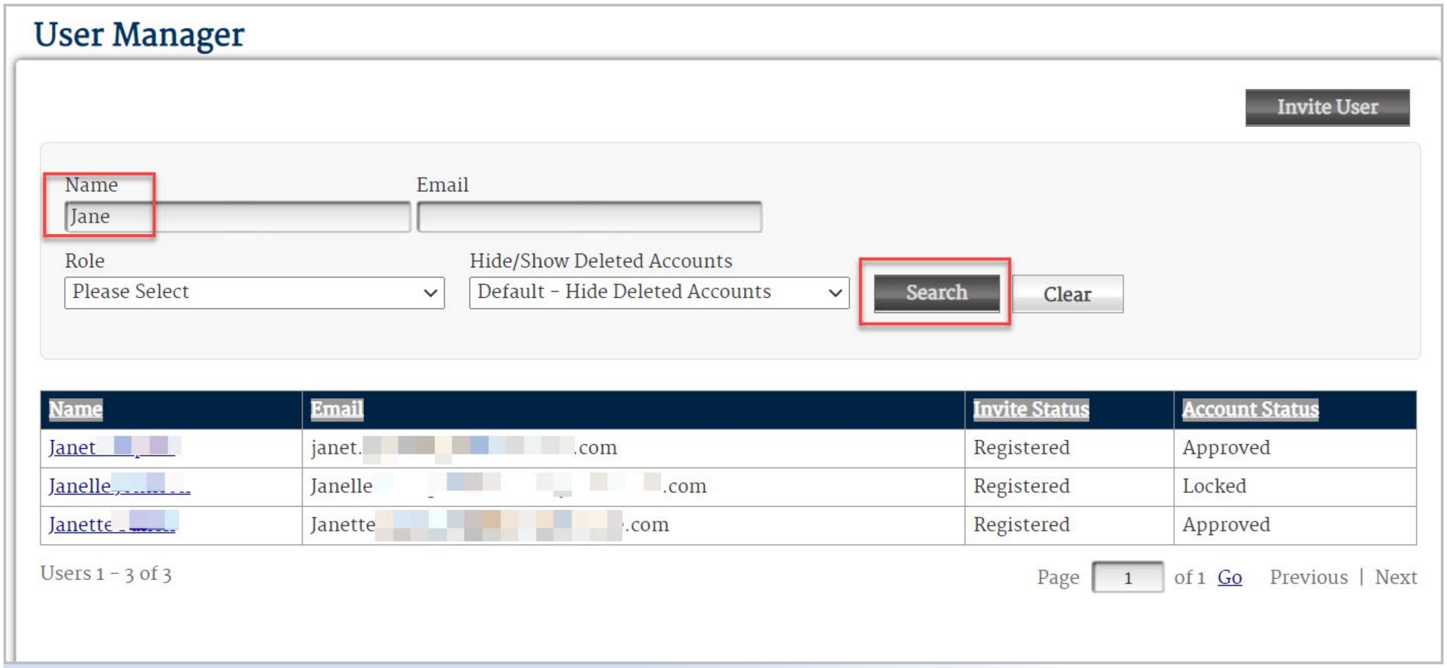


Figure 144

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.

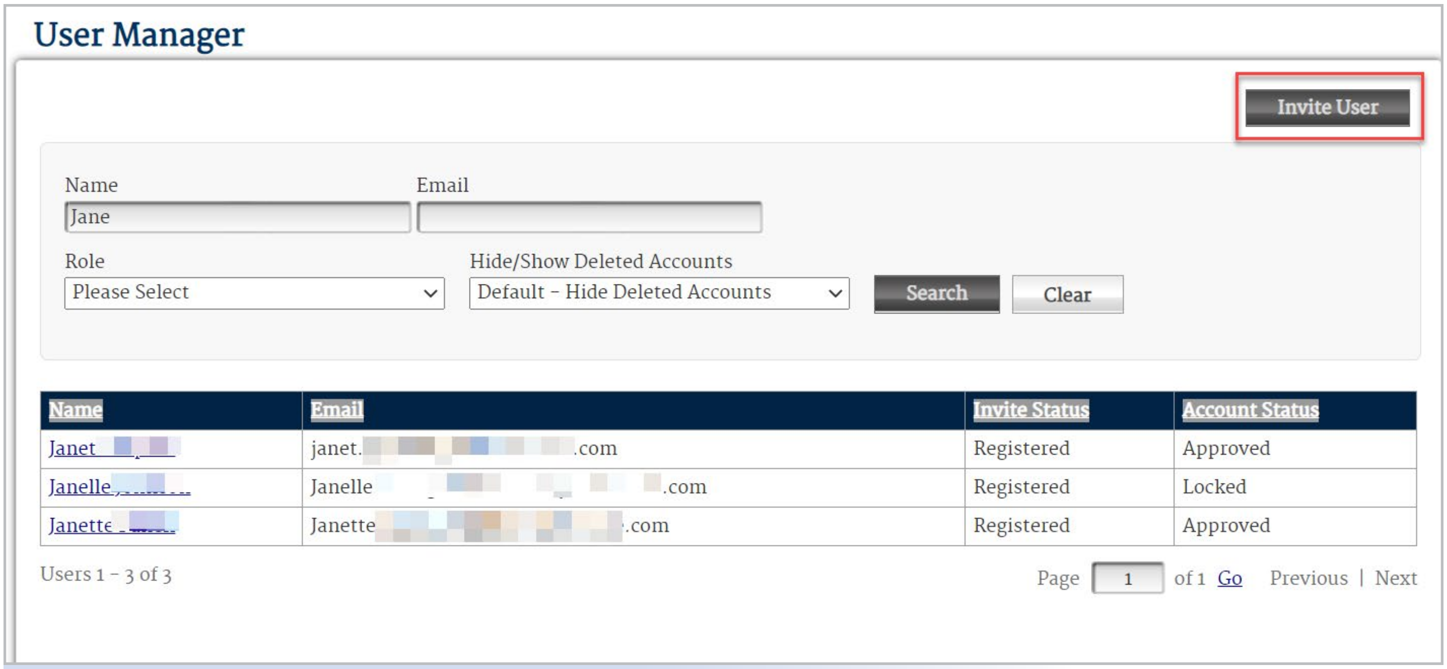


Figure 145

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.

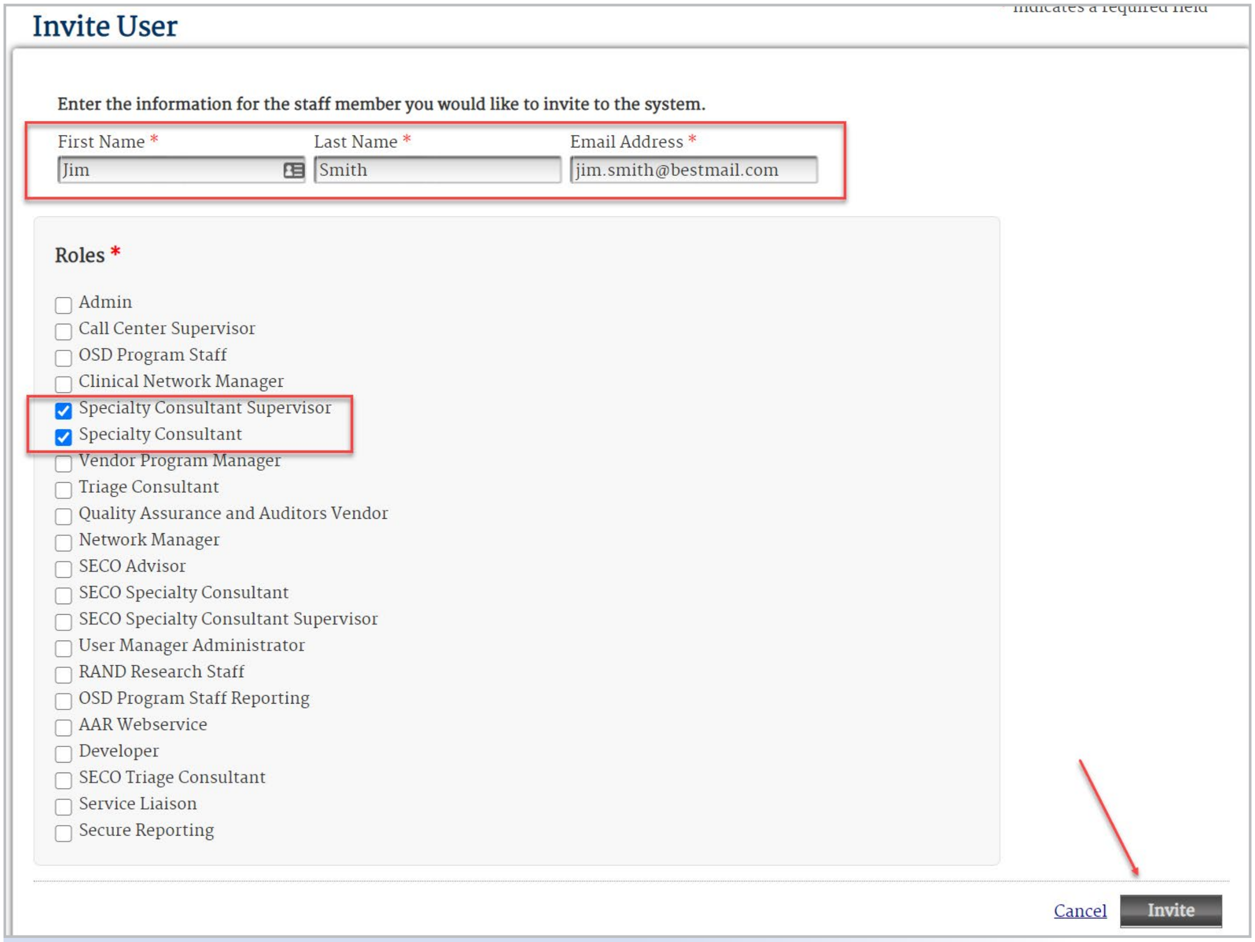


Figure 146

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.

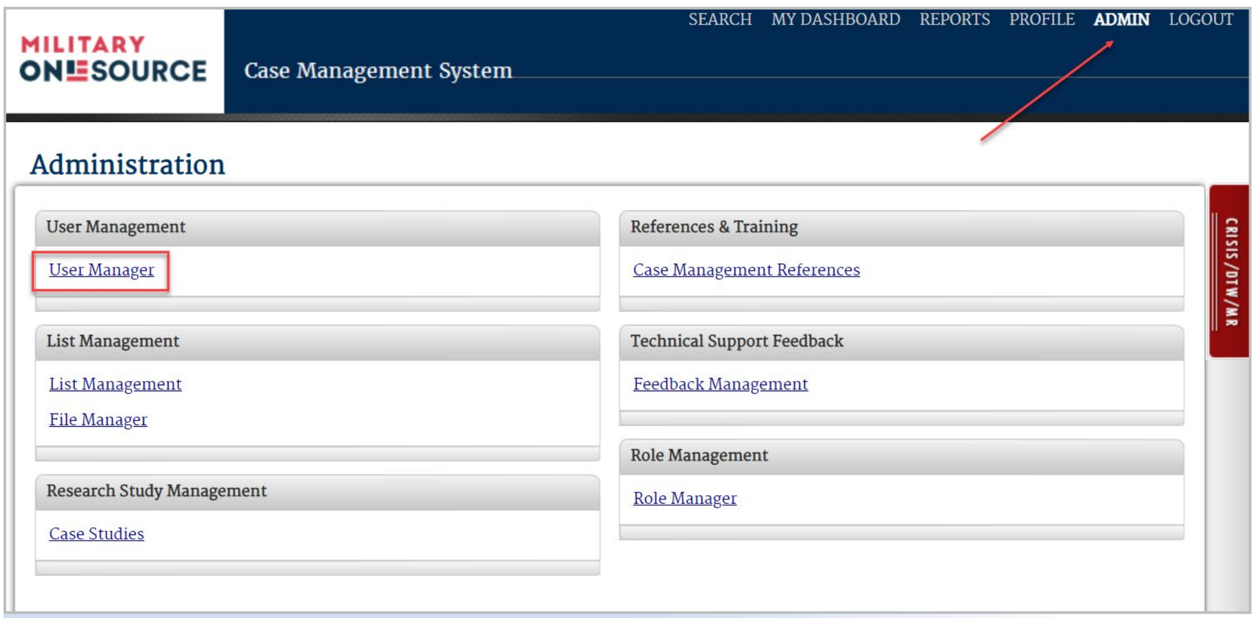


Figure 148

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.

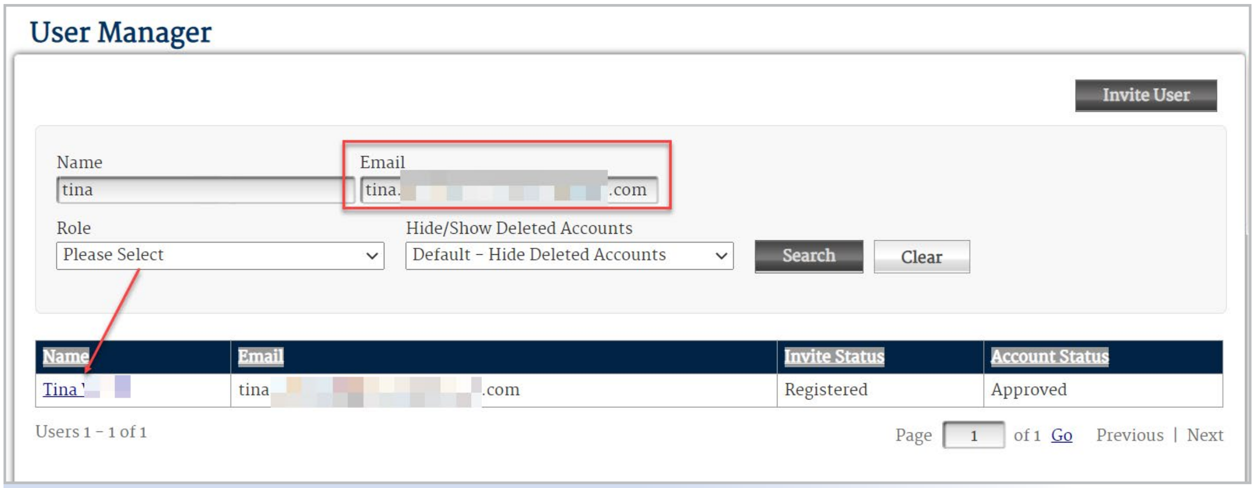


Figure 149

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.]

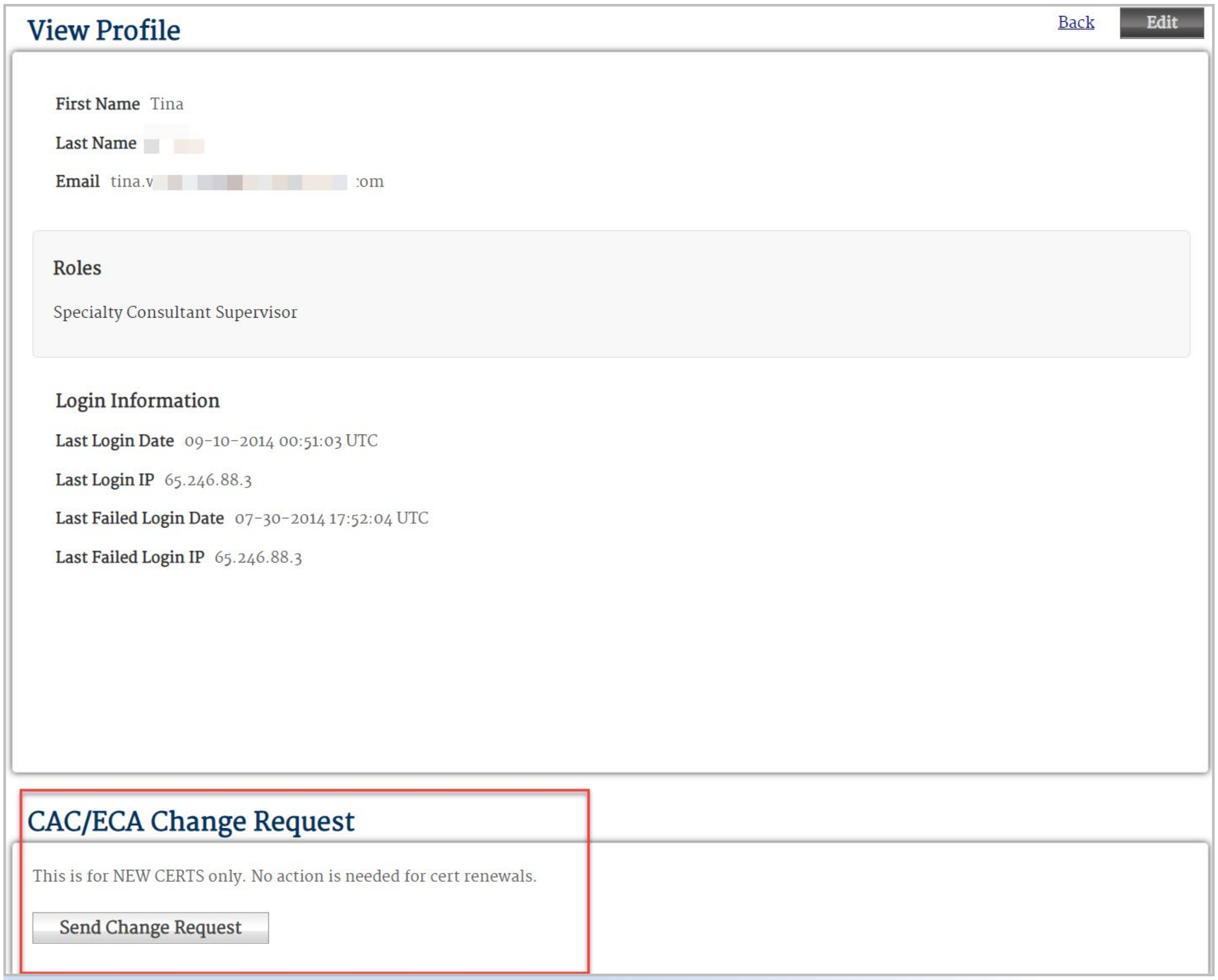


Figure 150

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.

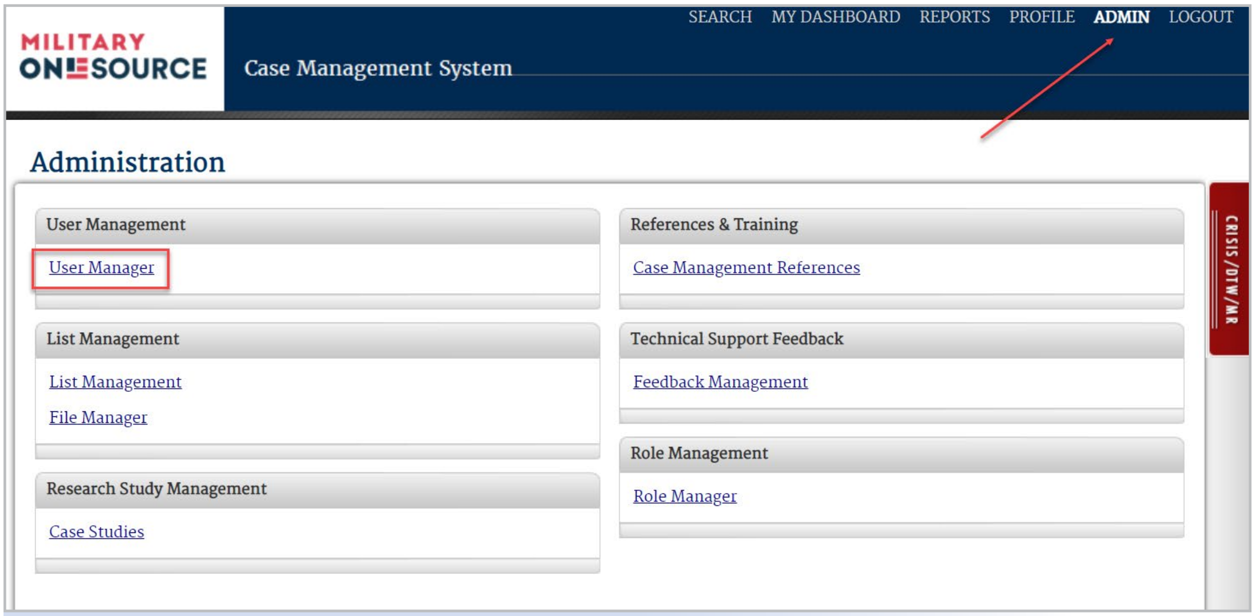


Figure 151

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.

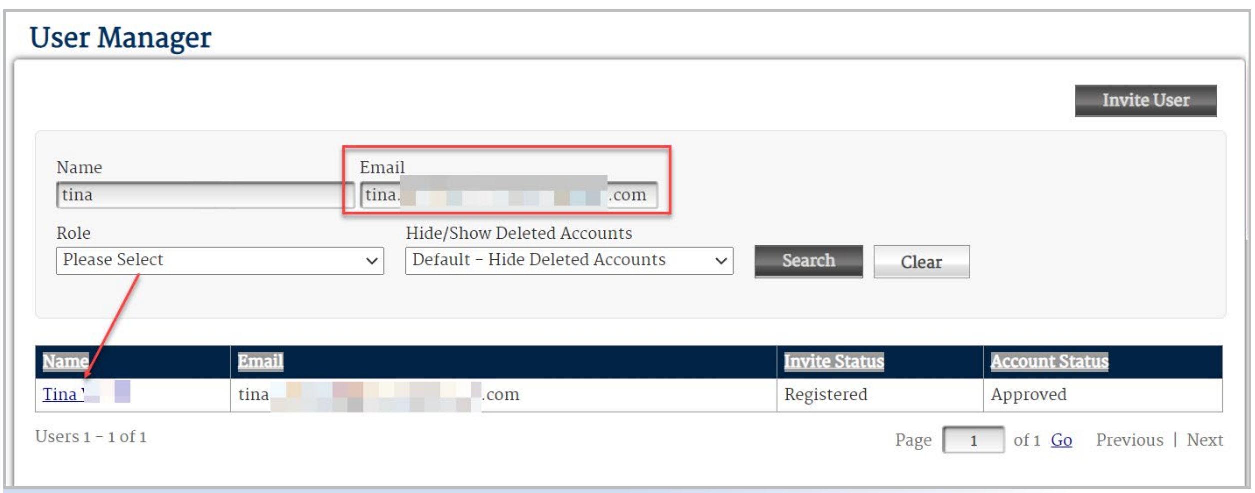


Figure 152

Open the "Edit" view.

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.

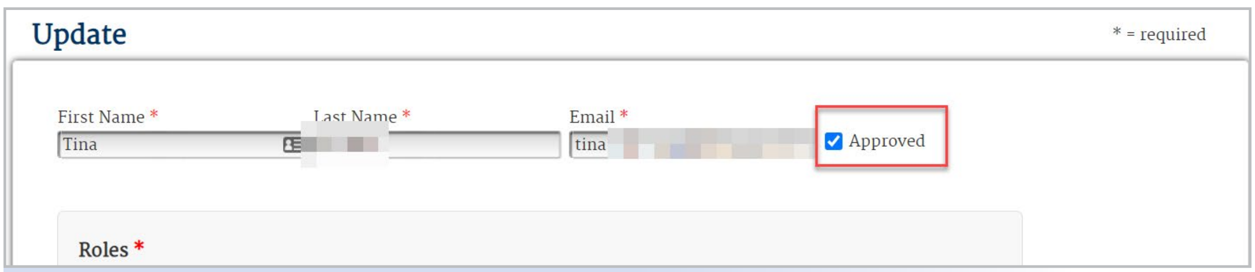


Figure 154

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.

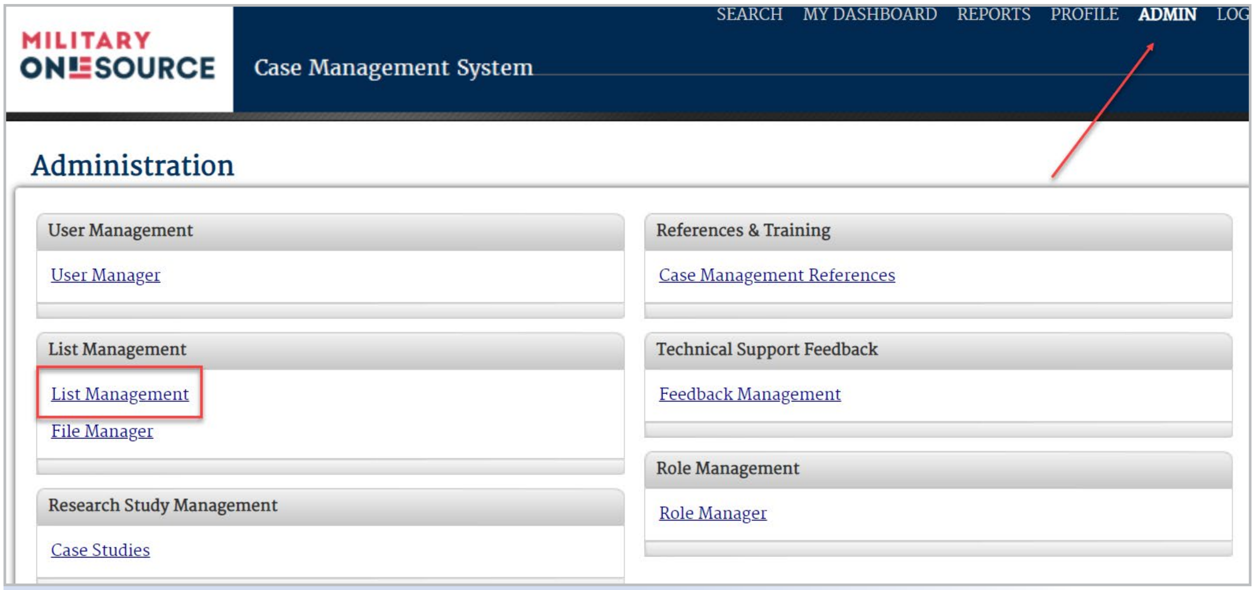


Figure 155

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.

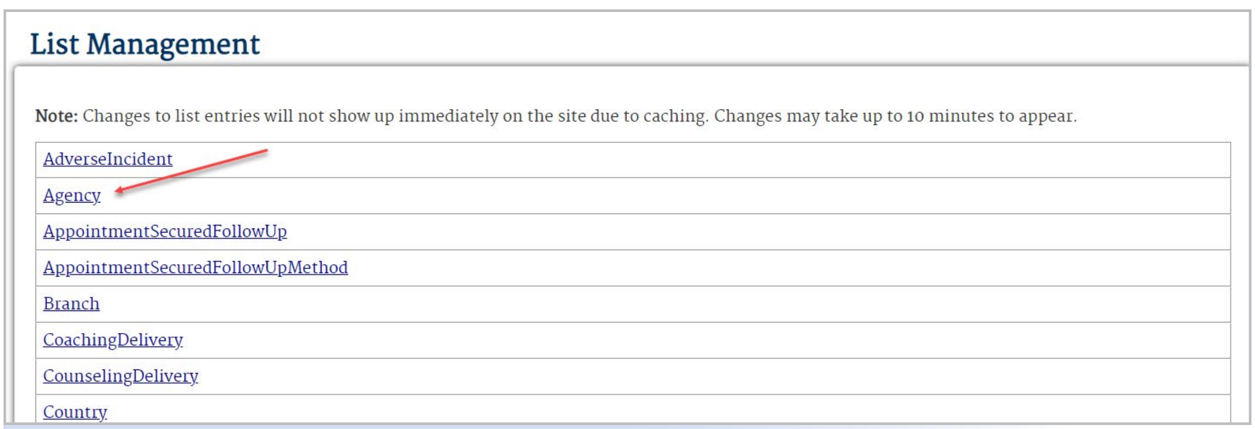


Figure 156

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

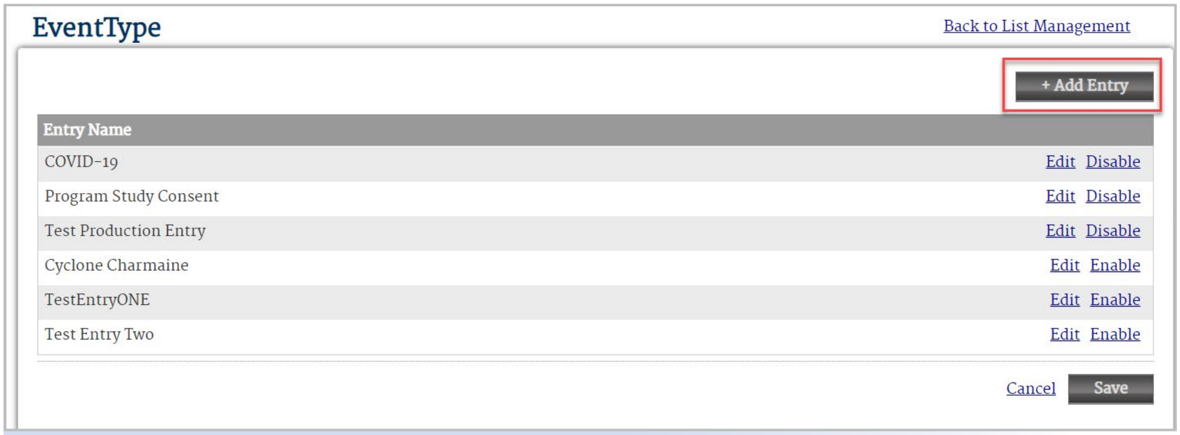


Figure 157

You just type in the "Entry Name" and click "Save."

Figure 158

The new entry appears in the list and is enabled.

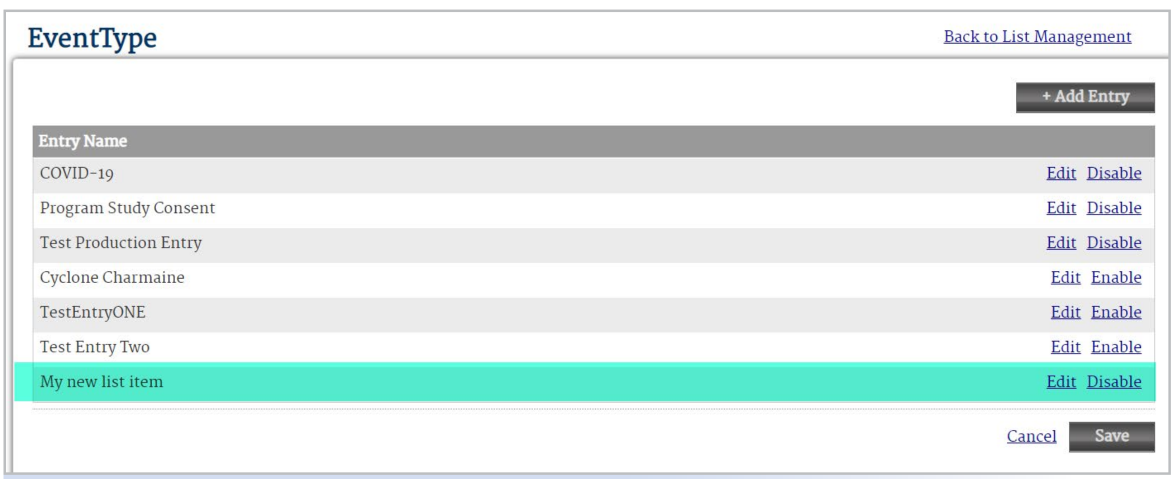


Figure 159

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.

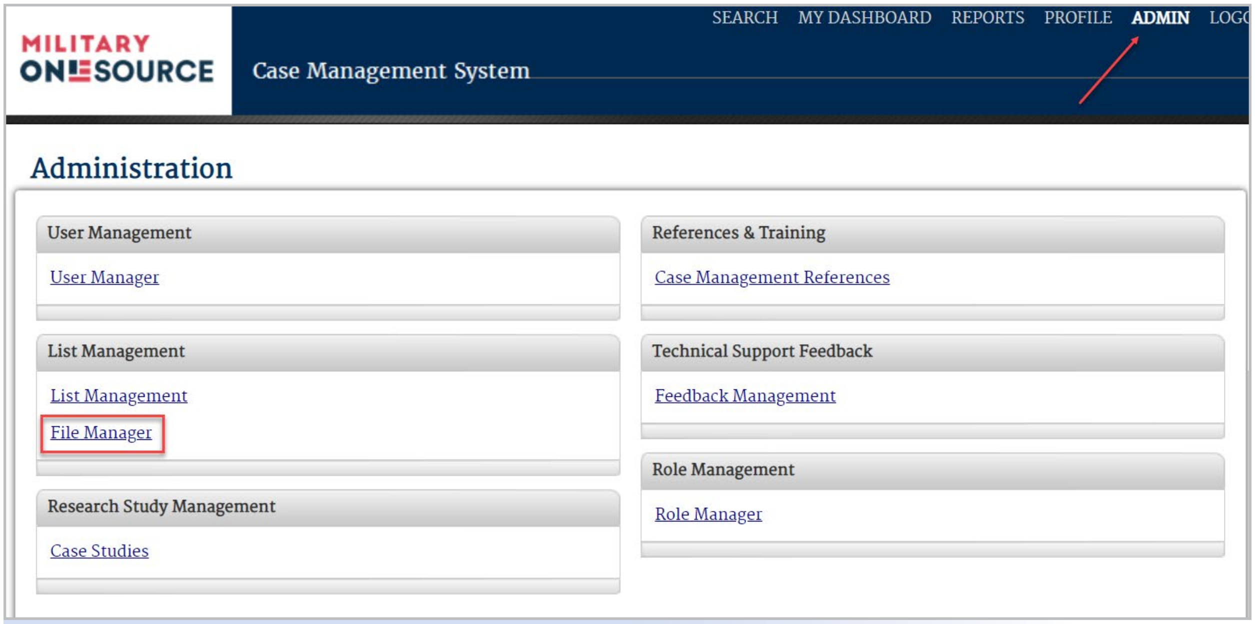


Figure 160

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.

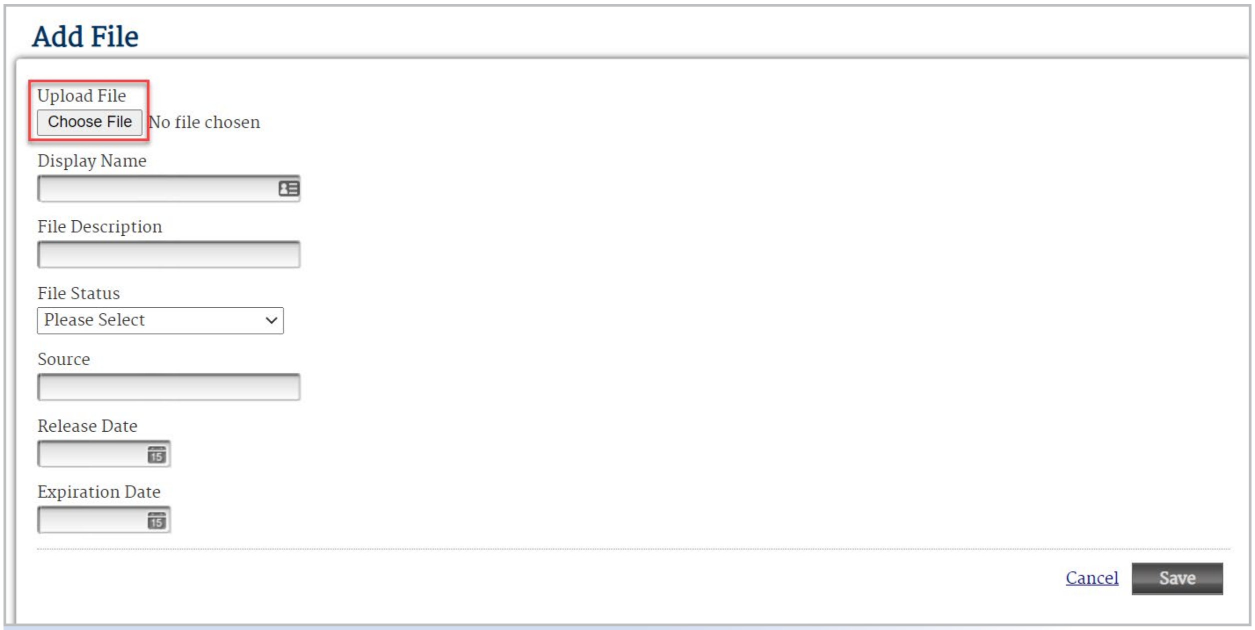


Figure 162

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

Figure 163

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

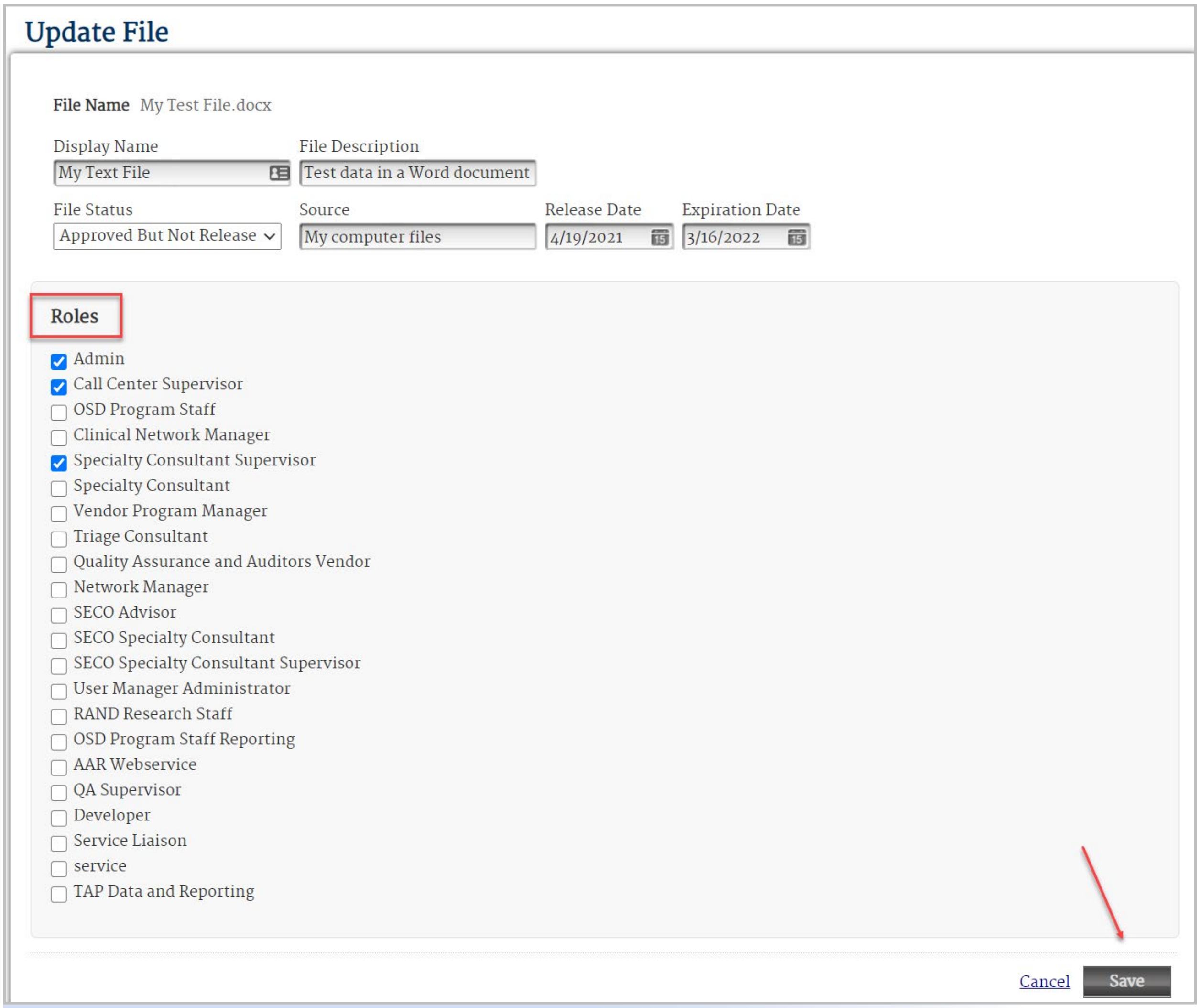
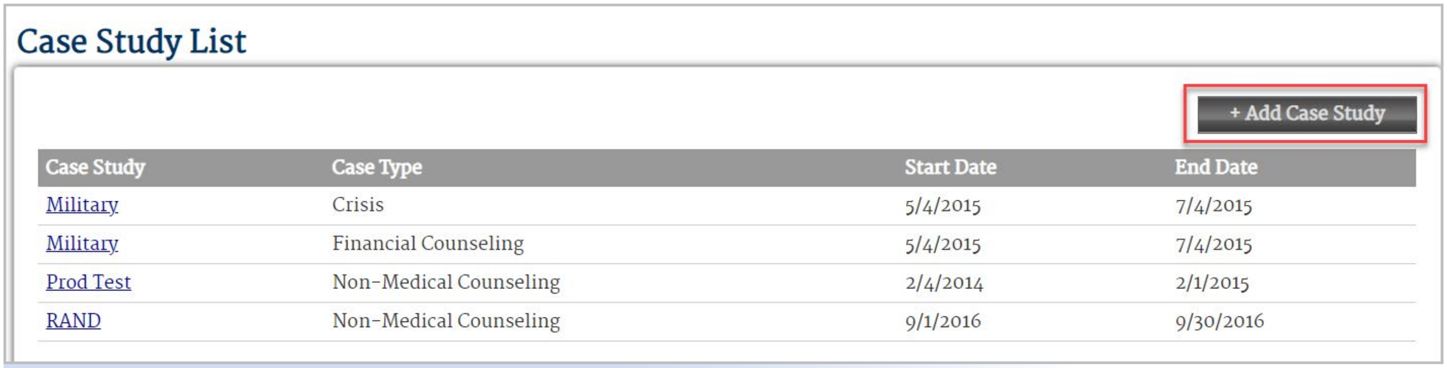


Figure 164

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.



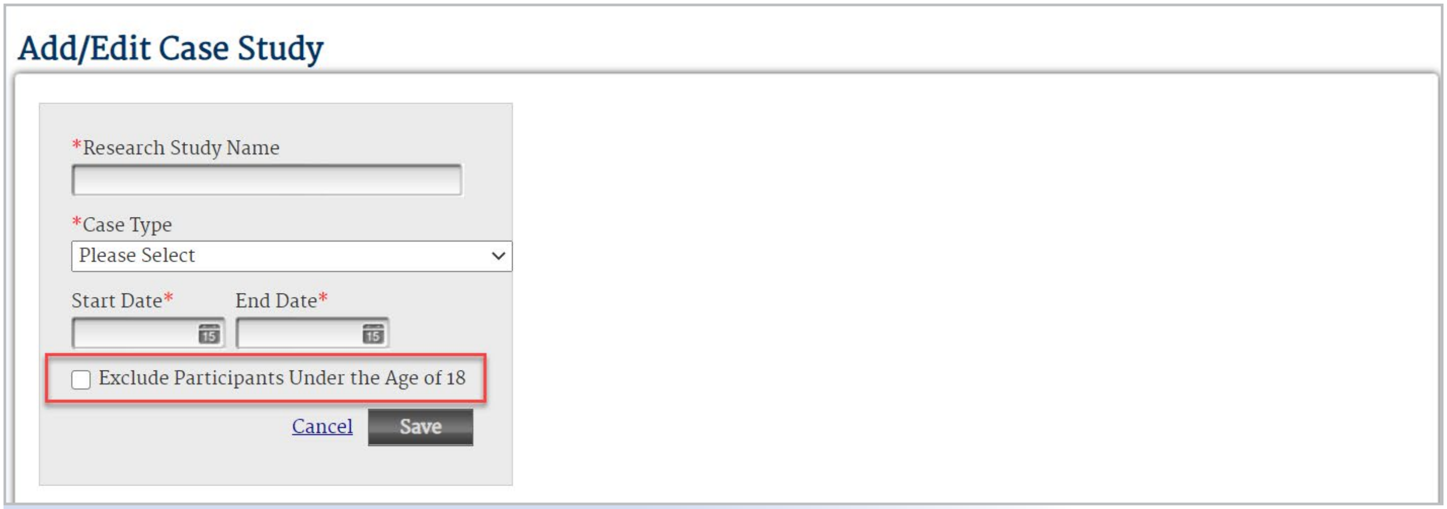
Case Study List

+ Add Case Study

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

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* End Date*

Exclude Participants Under the Age of 18

Cancel Save

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.

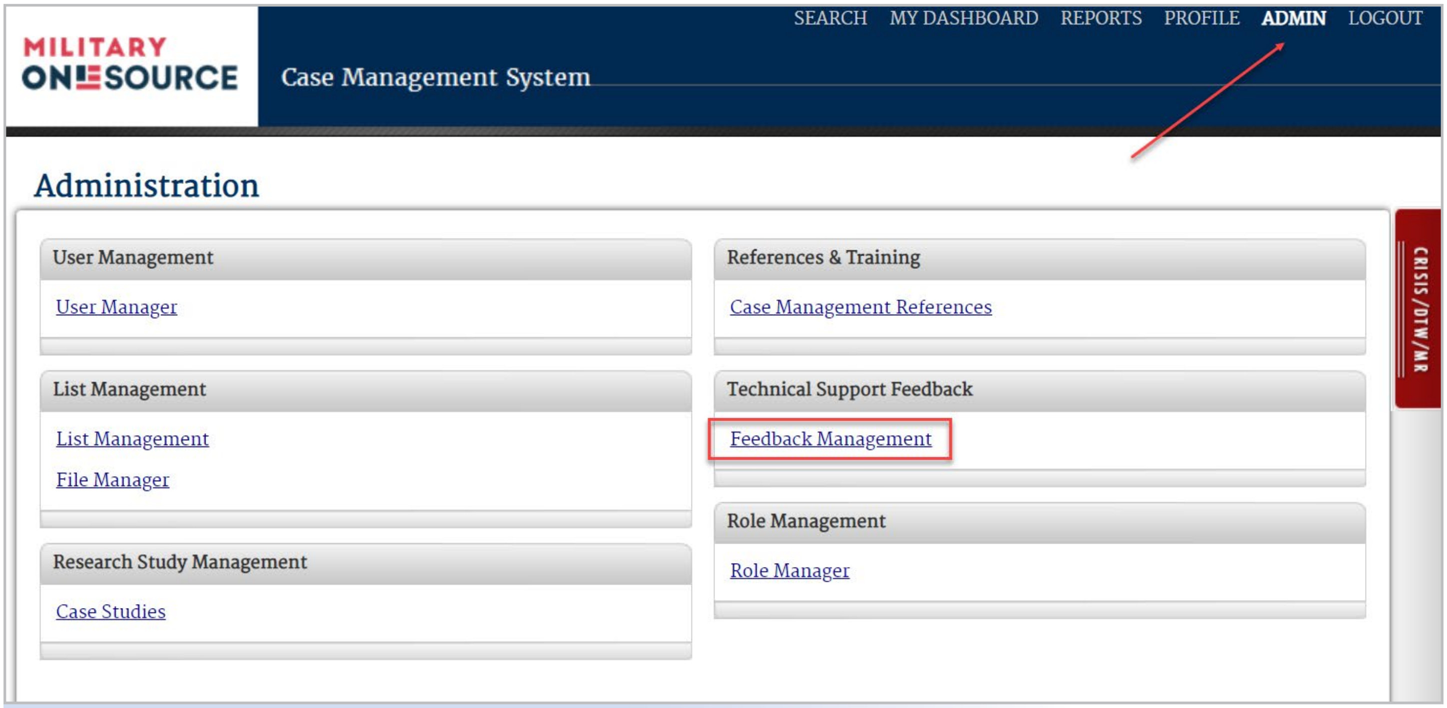


Figure 167

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.

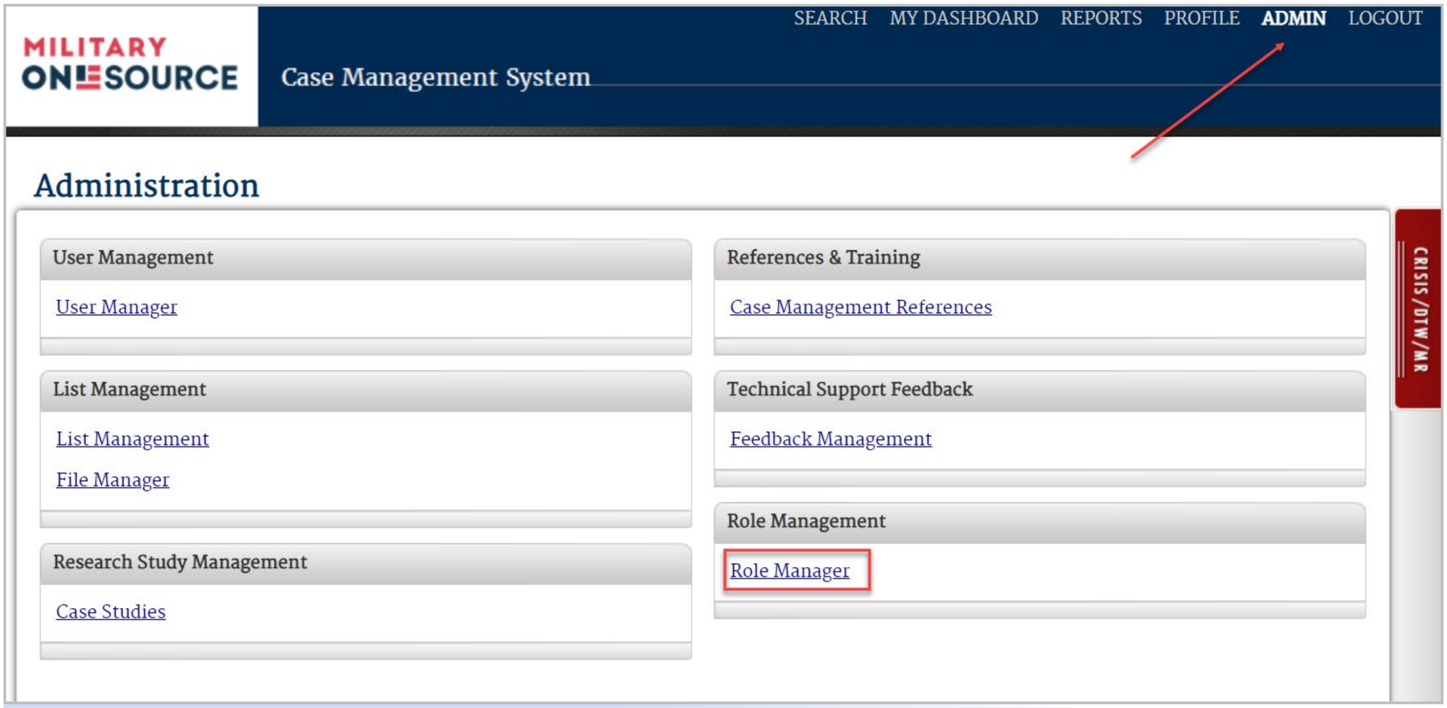


Figure 168

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.

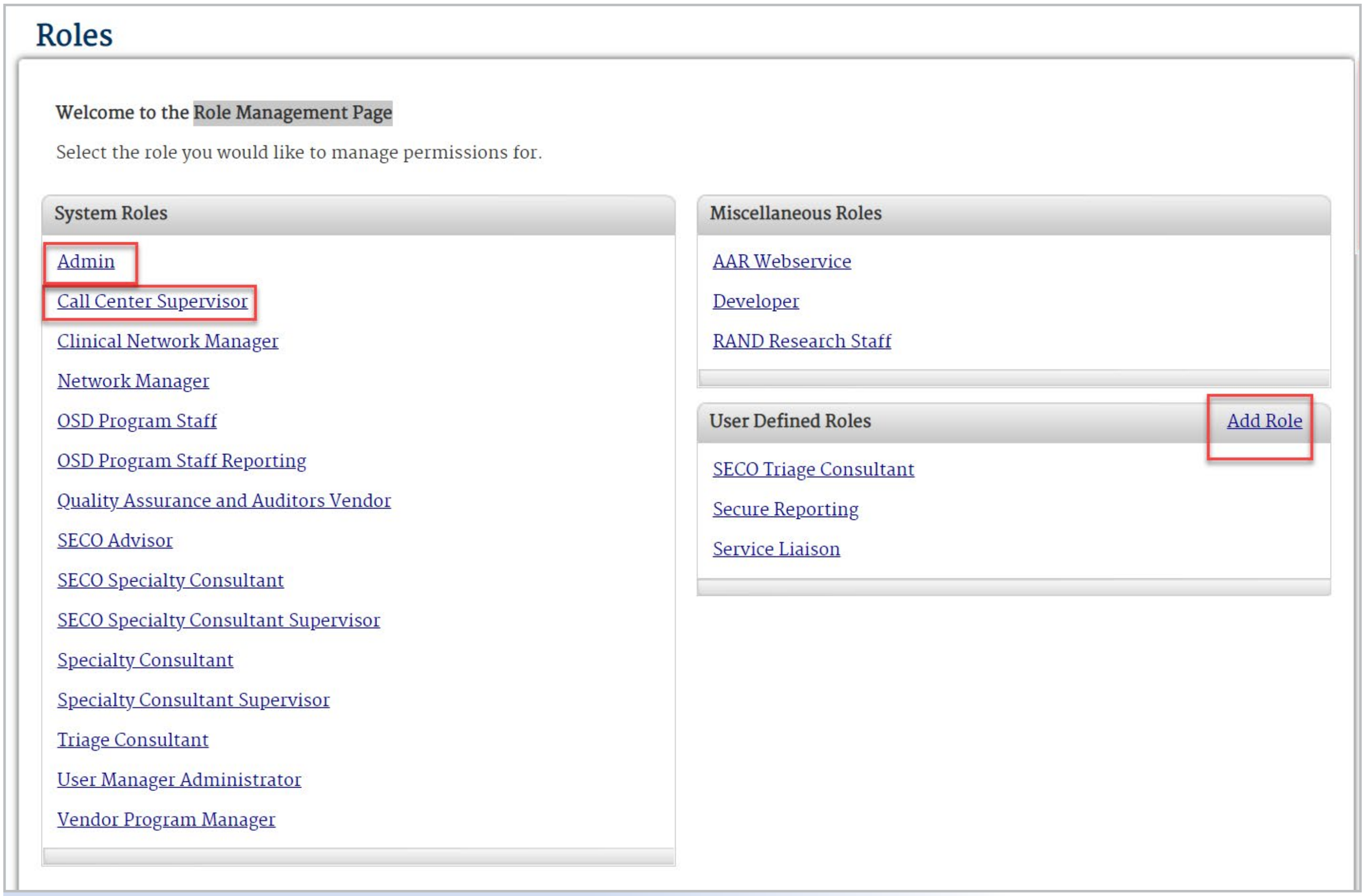
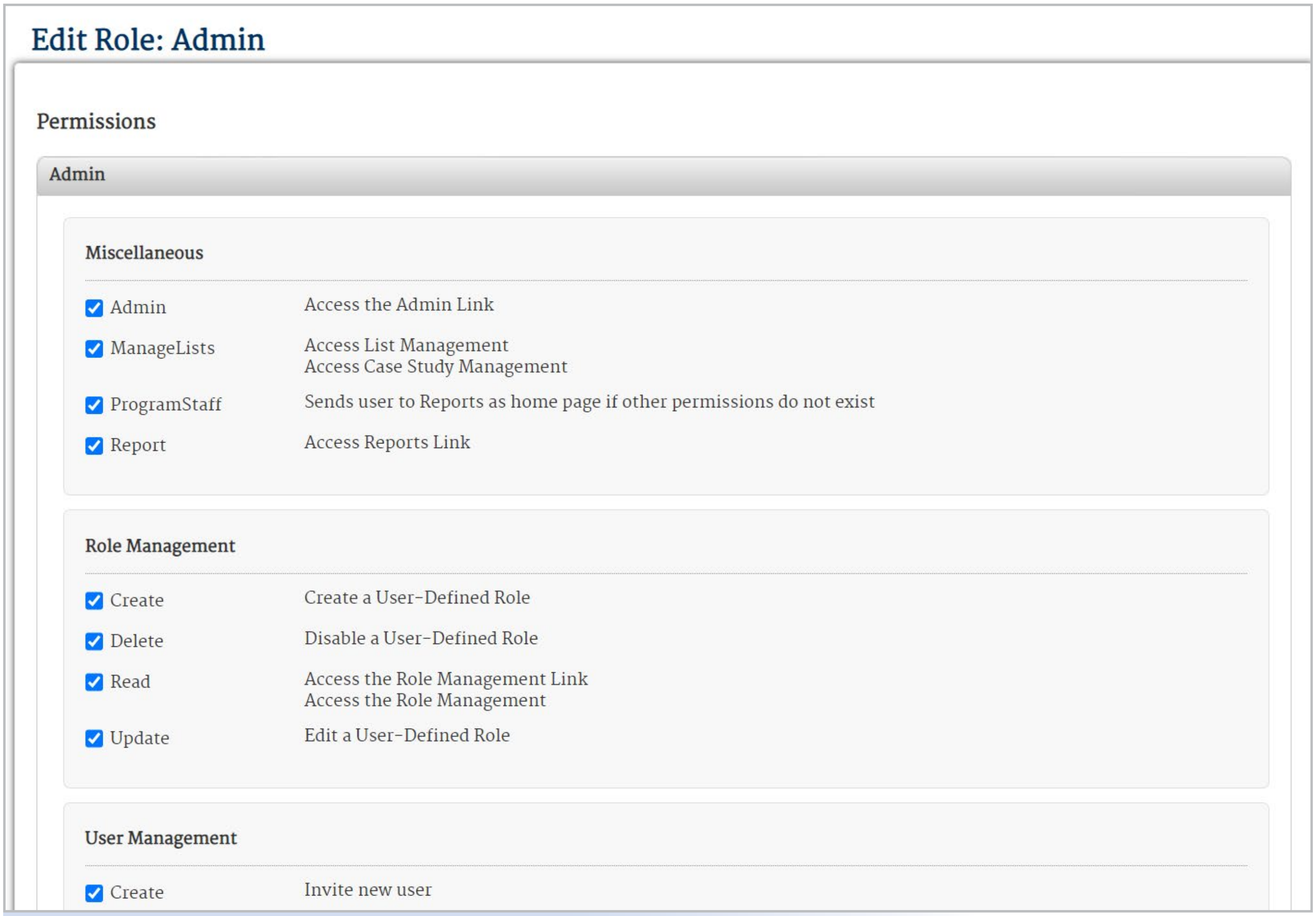


Figure 169



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.

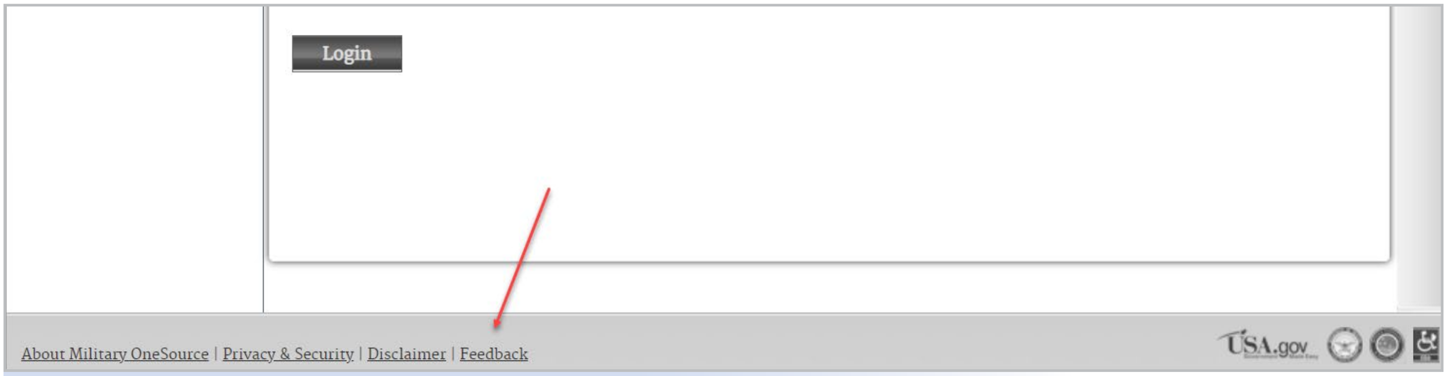


Figure 171