



MILITARY ON^{ES}SOURCE

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



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1. Your User Account

1.1. Register as a User

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

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

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

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

Case Management System

*** Security Warning ***

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

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

[Use of this system constitutes consent to monitoring for all lawful purposes.](#)

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

Figure 1



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

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

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

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

1.3. Editing Your Profile

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

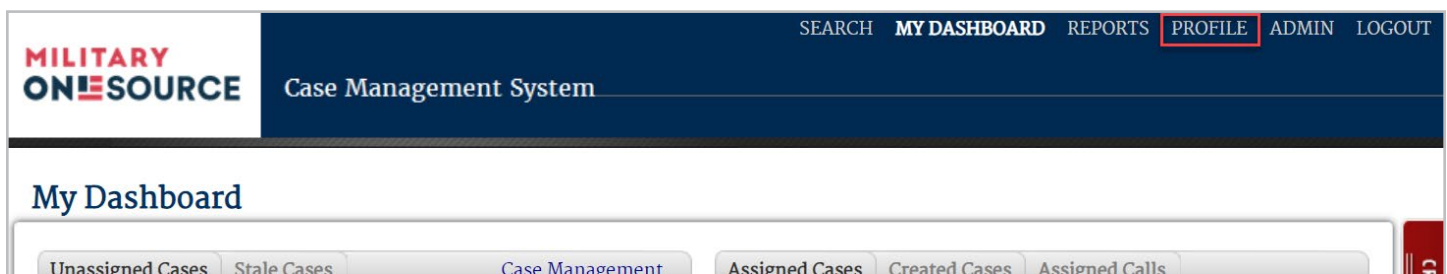


Figure 2

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



2. Main Dashboard

2.1. Overview

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

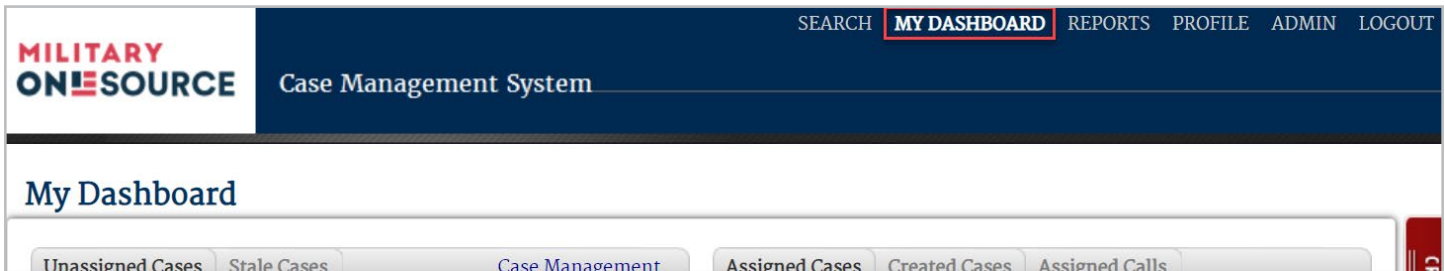


Figure 3

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

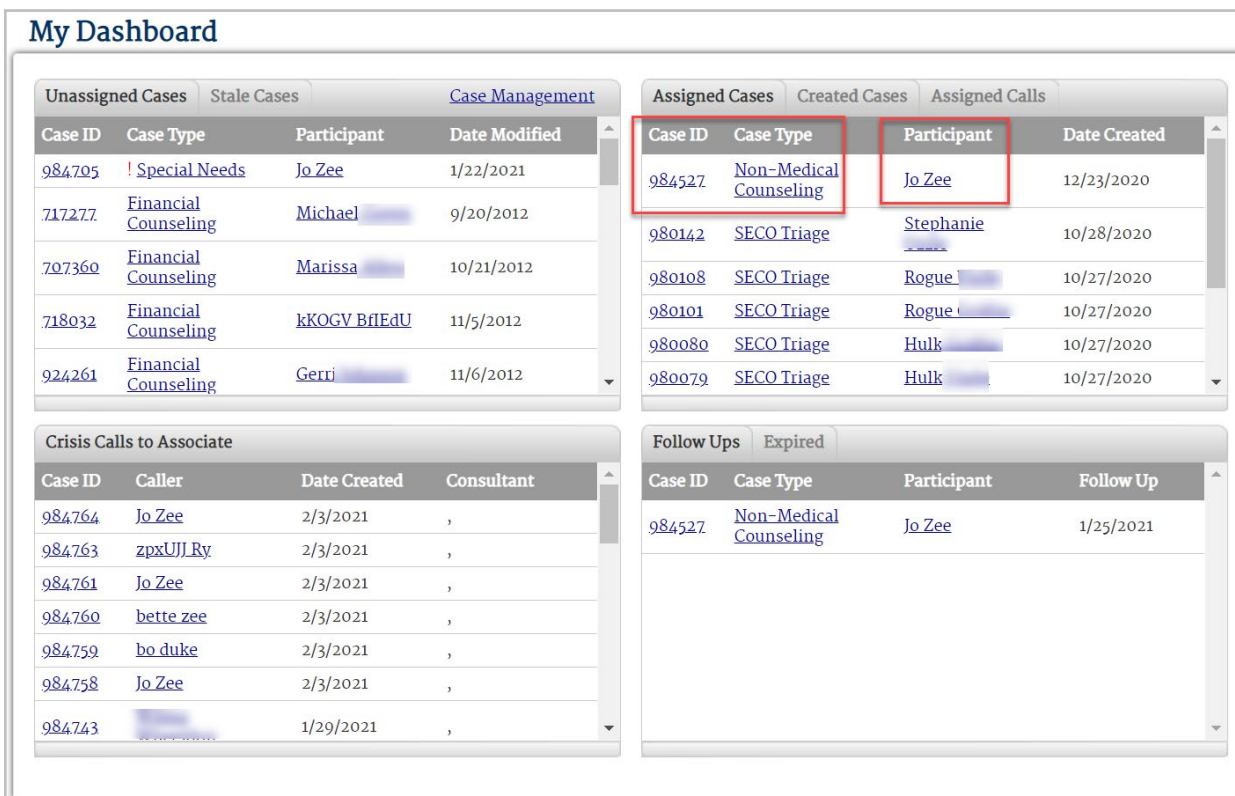


Figure 4



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

My Dashboard

Unassigned Cases

Stale Cases

Case Management

710149	Counseling	ANDpy-TML	1/15/2013
521223	Financial Counseling	CHIkLdu ZYfjblVD	1/14/2013
717338	Financial Counseling	IRnftt OUHqx- jifRyhk	1/15/2013
520889	Financial Counseling	Elqfl fzeNw	1/24/2013
522097	Financial Counseling	YrqT vTFbCHPE	1/25/2013
View All			

Assigned Cases

Created Cases

Assigned Calls

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

Figure 5



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

My Dashboard

Unassigned Cases				Assigned Cases			
Stale Cases				Created Cases			
Case Management				Assigned Calls			
Case ID	Case Type	Participant	Date Modified	Case ID	Case Type	Participant	Date Created
984705	! Special Needs	Jo Zee	1/22/2021	984527	Non-Medical Counseling	Jo Zee	12/23/2020
717277	Financial Counseling	Michael	9/20/2012	980142	SECO Triage	Stephanie	10/28/2020
707360	Financial Counseling	Marissa	10/21/2012	980108	SECO Triage	Rogue	10/27/2020
718032	Financial Counseling	kKOGV BfEdU	11/5/2012	980101	SECO Triage	Rogue	10/27/2020
924261	Financial Counseling	Gerri	11/6/2012	980080	SECO Triage	Hulk	10/27/2020
				980079	SECO Triage	Hulk	10/27/2020

Crisis Calls to Associate				Follow Ups			
Expired							
Case ID	Caller	Date Created	Consultant	Case ID	Case Type	Participant	Follow Up
984764	Jo Zee	2/3/2021	,	984527	Non-Medical Counseling	Jo Zee	1/25/2021
984763	zpxUJJ Ry	2/3/2021	,				
984761	Jo Zee	2/3/2021	,				
984760	bette zee	2/3/2021	,				
984759	bo duke	2/3/2021	,				
984758	Jo Zee	2/3/2021	,				
984743		1/29/2021	,				

Figure 6

2.2. Assigned Cases

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



2.3. Unassigned Cases

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

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

My Dashboard

Unassigned Cases				Assigned Cases			
Stale Cases				Created Cases			
Case Management				Assigned Calls			
Case ID	Case Type	Participant	Date Modified	Case ID	Case Type	Participant	Date Created
984709	! Special Needs	Jo Zee	1/22/2021	984527	Non-Medical Counseling	Jo Zee	12/23/2020
717277	Financial Counseling	Michael	9/20/2012	980142	SECO Triage	Stephanie	10/28/2020
707360	Financial Counseling	Marissa	10/21/2012	980108	SECO Triage	Rogue	10/27/2020
718032	Financial Counseling	kKOGV BfEdU	11/5/2012	980101	SECO Triage	Rogue	10/27/2020
924261	Financial Counseling	Gerri	11/6/2012	980080	SECO Triage	Hulk	10/27/2020
Crisis Calls to Associate				980079	SECO Triage	Hulk	10/27/2020
Case ID	Caller	Date Created	Consultant	Follow Ups			
984764	Jo Zee	2/3/2021	,	Expired			
984763	zpxUJJ Ry	2/3/2021	,	Case ID	Case Type	Participant	Follow Up
984761	Jo Zee	2/3/2021	,	984527	Non-Medical Counseling	Jo Zee	1/25/2021
984760	bette zee	2/3/2021	,				
984759	bo duke	2/3/2021	,				
984758	Jo Zee	2/3/2021	,				
984743		1/29/2021	,				

Figure 7

2.4. Stale Cases

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

2.5. Created Cases

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



2.6. Assigned Calls

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

2.7. Crisis Calls to Associate

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

2.8. Follow Ups

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

2.9. Expired

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



3. Supervisor Case Management Dashboard

3.1. Overview

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

3.2. Accessing the Case Management Dashboard

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

My Dashboard

Unassigned Cases

Stale Cases

Case Management

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

Assigned Cases

Created Cases

Assigned Calls

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

Crisis Calls to Associate

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

Follow Ups

Expired

Figure 8



3.3. Filters

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

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

Case Management Dashboard

Filter Cases

Assigned User

Participant

Creation Date Range
 To

☐ View Closed Cases

Creator Name

Creator ID

Modified Date Range
 To

Case Type(s)
Select Some Options

Follow-up Date Range
 To

Clear

Search

Case Management Dashboard								Display Rows: 25 Go
Assign selected cases to:		Please Select		Assign				
☐	Case Id	Case Type	Assigned User	Participant	Creator Name	Creation Date	Date Modified	Follow-up Date
☐	937812	Financial Counseling	Lisa2	ExxDZSJaxBREBO	DKwaW J	10/13/2014	7/18/2018	10/13/2014
☐	937639	Financial Counseling	Lisa2	Elizabeth	Lpolayv	10/13/2014	7/18/2018	10/14/2014
☐	938333	Financial Counseling	PKROS1	Raul	UWvEkS	10/13/2014	9/1/2015	10/14/2014
☐	939083	Financial Counseling	Natasha	nGklv tvdKM	Natasha	12/3/2014	12/3/2014	12/3/2014
☐	939074	Financial Counseling	Patricia	sLOaM VUkGVjwCHZ	Patricia I	12/3/2014	12/3/2014	12/5/2014
☐	939335	Financial Counseling	Christopher	Christopher	Christopher	12/15/2014	12/15/2014	12/16/2014

Figure 9



3.4. Result Set

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

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

Case Management Dashboard

Filter Cases

Assigned User Participant Creation Date Range To ☐ View Closed Cases

Creator Name Creator ID Modified Date Range To

Case Type(s) Follow-up Date Range To

Case Management Dashboard

Display Rows: 25

Assign selected cases to:

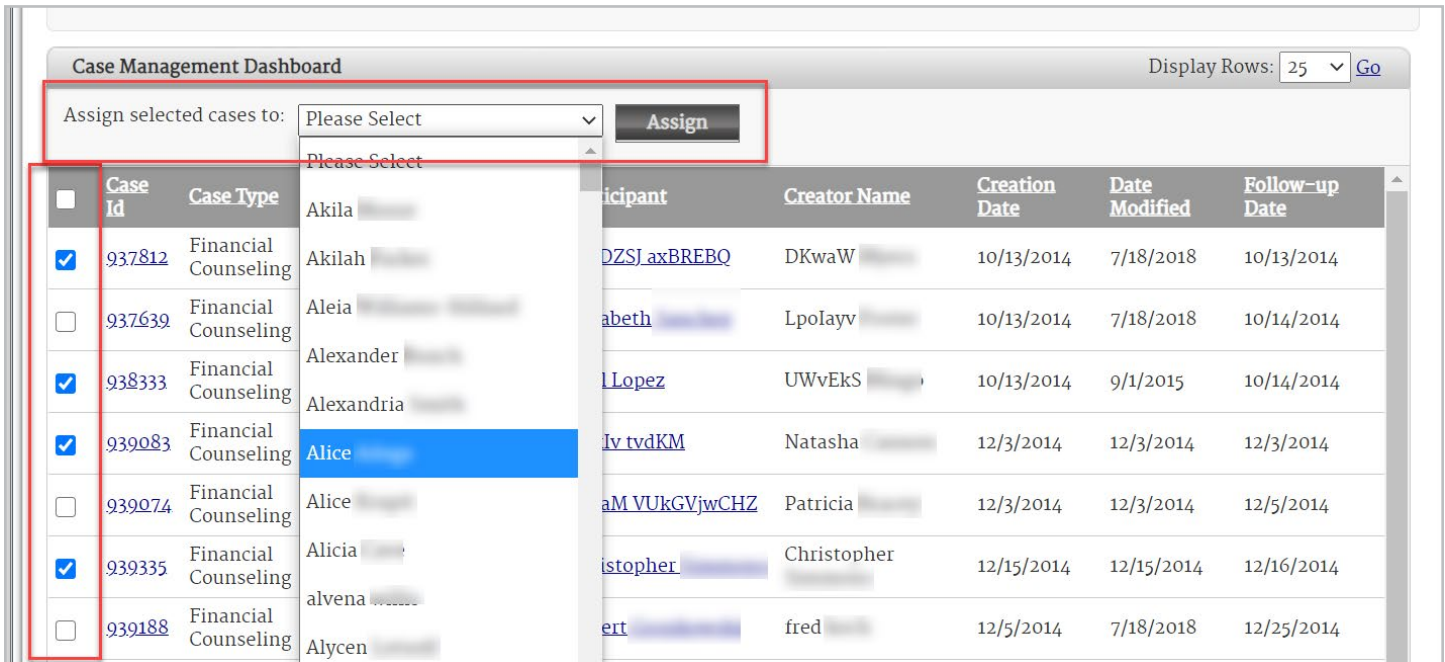
☐	Case Id	Case Type	Assigned User	Participant	Creator Name	Creation Date	Date Modified	Follow-up Date
☐	937812	Financial Counseling	Lisa2	ExxDZSJ_axBREBO	DKwaW J	10/13/2014	7/18/2018	10/13/2014
☐	937639	Financial Counseling	Lisa2	Elizabeth	Lpolayv	10/13/2014	7/18/2018	10/14/2014
☐	938333	Financial Counseling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

Figure 10



3.5. Bulk Assigning

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



Case Management Dashboard

Display Rows: 25 [Go](#)

Assign selected cases to: Please Select Assign

Please Select

☐	Case Id	Case Type	Participant	Creator Name	Creation Date	Date Modified	Follow-up Date
☒	937812	Financial Counseling	Akila	AKW	10/13/2014	7/18/2018	10/13/2014
☐	937639	Financial Counseling	Aleia	LpOlav	10/13/2014	7/18/2018	10/14/2014
☒	938333	Financial Counseling	Alexander	UWvEkS	10/13/2014	9/1/2015	10/14/2014
☒	939083	Financial Counseling	Alice	Natasha	12/3/2014	12/3/2014	12/3/2014
☐	939074	Financial Counseling	Alice	Patricia	12/3/2014	12/3/2014	12/5/2014
☒	939335	Financial Counseling	Alicia	Christopher	12/15/2014	12/15/2014	12/16/2014
☐	939188	Financial Counseling	Alycen	fred	12/5/2014	7/18/2018	12/25/2014

Figure 11



4. Search

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

4.1. Search for a Participant

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

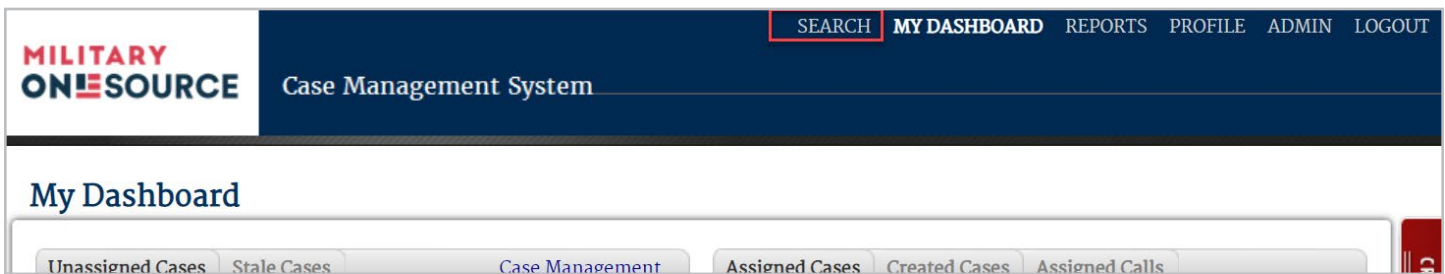


Figure 12

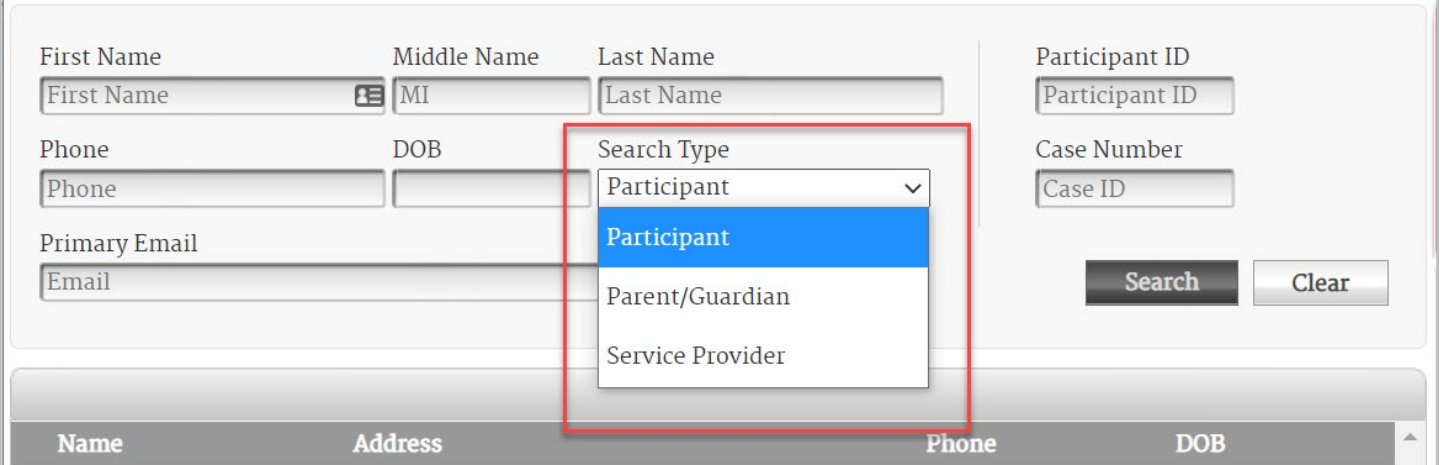
“Search Type” is set to search for Participants by default, but you can also search for “[Parent/Guardian](#)” or “[Service Provider](#)”.

Figure 13



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

Search



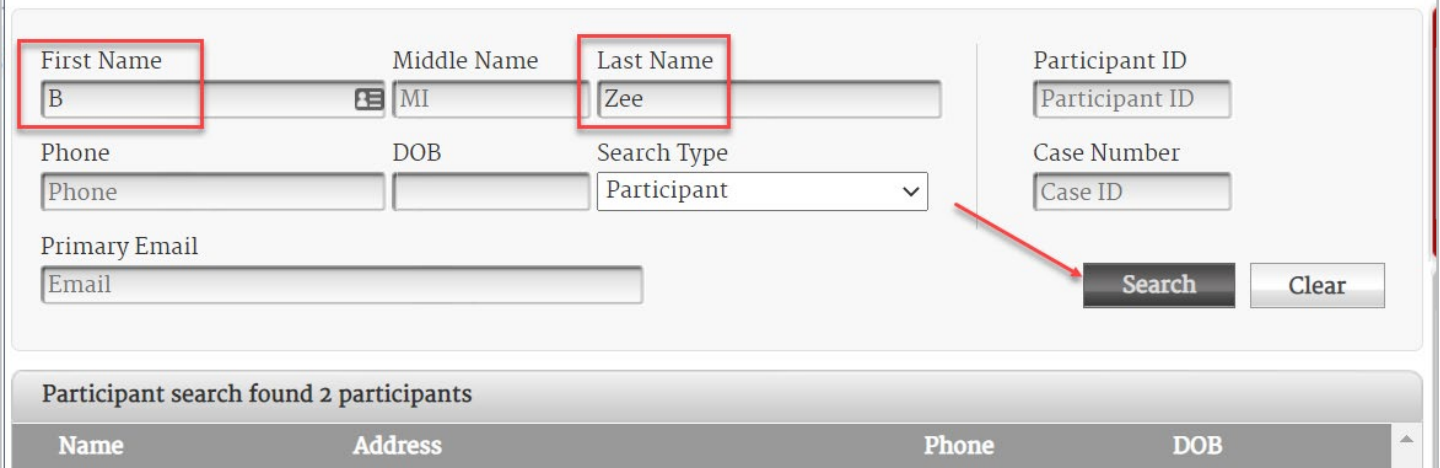
First Name First Name	Middle Name MI	Last Name Last Name	Participant ID Participant ID
Phone Phone	DOB	Search Type Participant	Case Number Case ID
Primary Email Email			Search Clear

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

Figure 14

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

Search



First Name B	Middle Name MI	Last Name Zee	Participant ID Participant ID
Phone Phone	DOB	Search Type Participant	Case Number Case ID
Primary Email Email			Search Clear

Participant search found 2 participants

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

Figure 15



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

Search

First Name	Middle Name	Last Name	Participant ID
B	MI	Zee	Participant ID
Phone	DOB	Search Type	Case Number
Phone		Participant	Case ID
Primary Email			
Email			
Search			Clear

Participant search found 2 participants

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

Figure 16

4.2. Search for a Parent/Guardian

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

MILITARY ONESOURCE	SEARCH	MY DASHBOARD	REPORTS	PROFILE	ADMIN	LOGOUT
	Case Management System					

My Dashboard

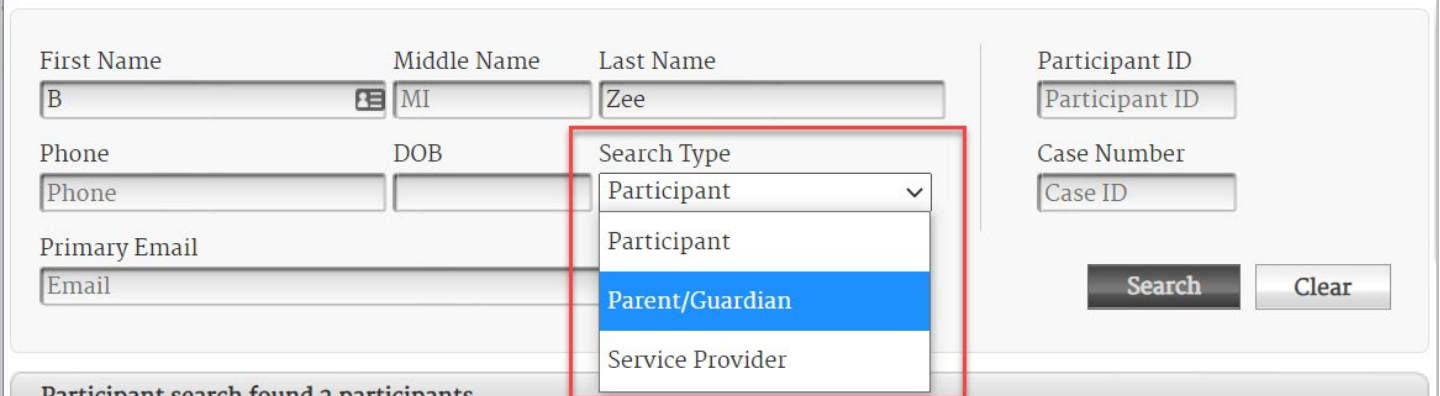
Unassigned Cases	Stale Cases	Case Management	Assigned Cases	Created Cases	Assigned Calls
------------------	-------------	-----------------	----------------	---------------	----------------

Figure 17



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

Search



First Name: B Middle Name: MI Last Name: Zee

Phone: Phone DOB: Search Type: Participant (dropdown menu open, showing options: Participant, Parent/Guardian, Service Provider)

Primary Email: Email

Participant ID: Participant ID Case Number: Case ID

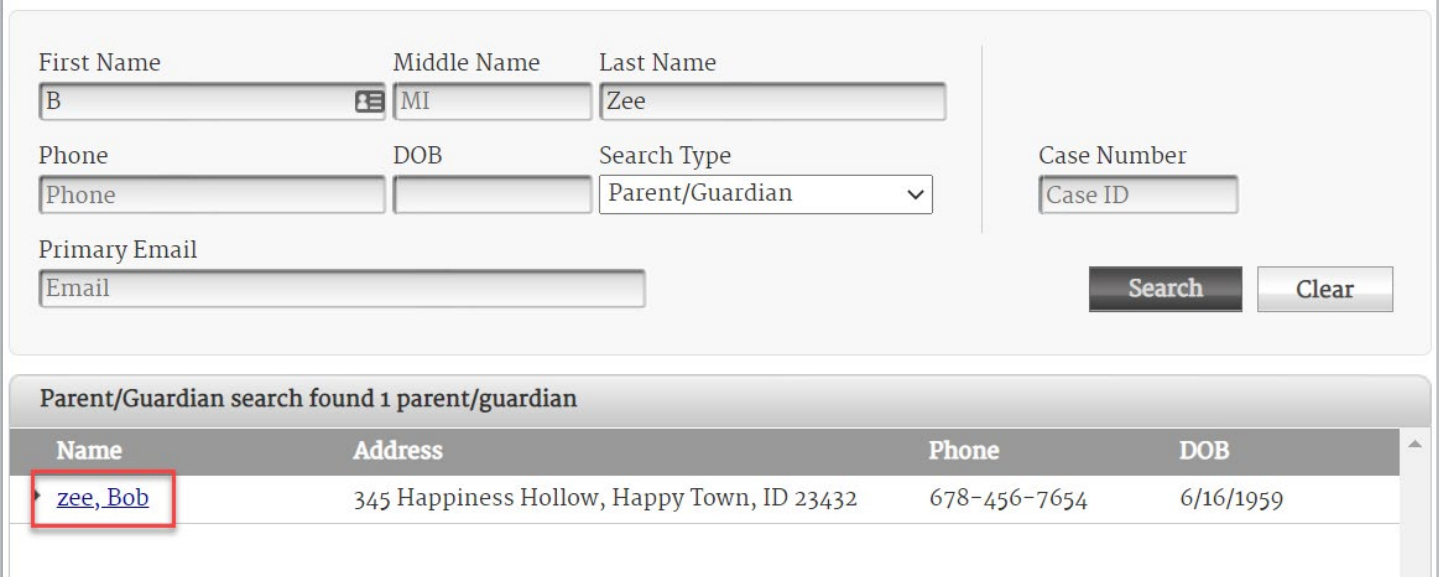
Search Clear

Participant search found 2 participants

Figure 18

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

Search



First Name: B Middle Name: MI Last Name: Zee

Phone: Phone DOB: Search Type: Parent/Guardian (dropdown menu open, showing options: Participant, Parent/Guardian, Service Provider)

Primary Email: Email

Case Number: Case ID

Search Clear

Parent/Guardian search found 1 parent/guardian

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

Figure 19



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

Search

First Name Middle Name Last Name

View Parent/Guardian

First	Middle	Last	Suffix	Preferred Phone
Test		Parent III		555-555-5555
DOB	Sex	Marital Status		Work Phone
2/7/1956	Male	Divorced		Cell Phone
Current Address				Email Address
123 Towns				
Address (continued)				Requires Interpreter
				No
City	State	Postal Code	Country	
Town	AZ	55555	United States	

Associated Minor Participant(s)

Name	Address	Phone	DOB
Drive, Test	Test Drive Lane, Lane, CI 33730	222-222-2222	1/7/2012
Minor, Test	123 Dell, Network, OK 12345	555-555-5555	2/13/2012

Void **Close** **Edit**

Figure 20



4.3. Search for Service Provider

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

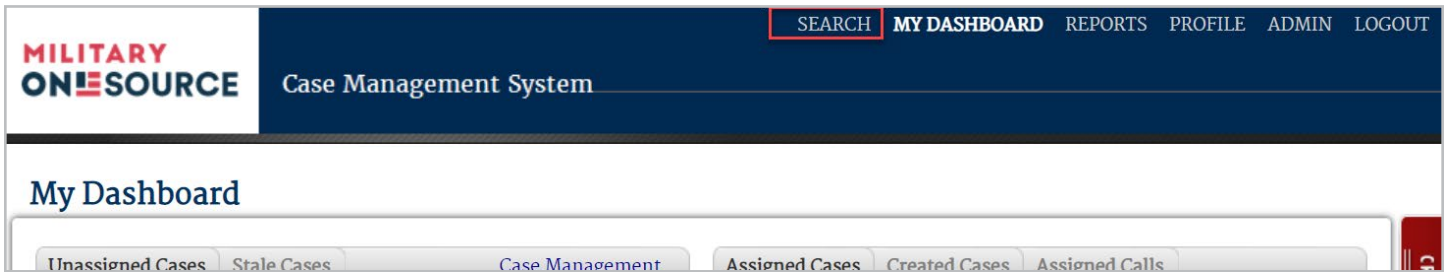


Figure 21

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

Figure 22



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

Search

First Name	Middle Name	Last Name	Service Provider ID
B	MI	Zee	Provider ID
Phone	DOB	Search Type	Call Number
Phone	Not Applicable	Service Provider	Call ID
Primary Email			
Email			

Service Provider search found 2 service providers

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

Figure 23

4.4. Search for a Case

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

SEARCH

MY DASHBOARD

REPORTS

PROFILE

ADMIN

LOGOUT

Case Management System

My Dashboard

Unassigned Cases

Stale Cases

Case Management

Assigned Cases

Created Cases

Assigned Calls

Figure 24



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

Search

First Name	Middle Name	Last Name	Participant ID
B	MI	Zee	Participant ID
Phone	DOB	Search Type	Case Number
Phone		Participant	254986
Primary Email			
Email			

Figure 25



5. Working With Participant Records

5.1. Overview

Most activities you will be doing in the system will be interacting with the Participants' records. This section will cover the most important actions with Participant records:

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

5.2. Create a Participant

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

Search

First Name
B

Middle Name
MI

Last Name
Zee

Participant ID
Participant ID

Case Number
Case ID

Phone
Phone

DOB

Search Type
Participant

Primary Email
Email

Search

Clear

Service Provider search found 2 service providers

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

1 - 2 of 2

Page 1 of 1 Go Previous | Next

+ Add New

Figure 26

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



*** indicates a required field**

*First Test	Middle FEB18	*Last Participant	Suffix
*DOB 02/18/2001	*Sex Female	*Marital Status Single	

Current Address
123 Test Way

Address (continued)

City TestTown	State VA	Postal Code 44444	Country United States
------------------	-------------	----------------------	--------------------------

Preferred Phone
222-222-2222 ☒ Confidential

Work Phone

Cell Phone
☒ Confidential

Email Address
test@test.mil ☒ Confidential

☐ Requires Interpreter
Please Select

*Receive Outreach Communications
Text

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

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
Self

*Branch of SVC
Marine Corps

*Pay Grade
E-9

*Eligibility Status
Active Duty

Separation/Retirement Date

☐ Wounded Warrior

*Assigned Installation
Marine Corps Forces, Pacific

Explain selection of "Other" or "Unknown"

☐ Administrative Notes Need Review

Administrative Notes [add](#)

Figure 27



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

Create New Participant

* indicates a required field

*First

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.

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

State

Postal Code

Country

Ville

SD

55555

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 29



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

Create New Participant

* indicates a required field

*First

Middle

*Last

Suffix

Jane

Q

Doe

*DOB

*Sex

*Marital Status

02/01/2022

Female

Single

Current Address

123 Test Drive

Address (continued)

City

State

Postal Code

Country

Ville

SD

55555

United State:

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

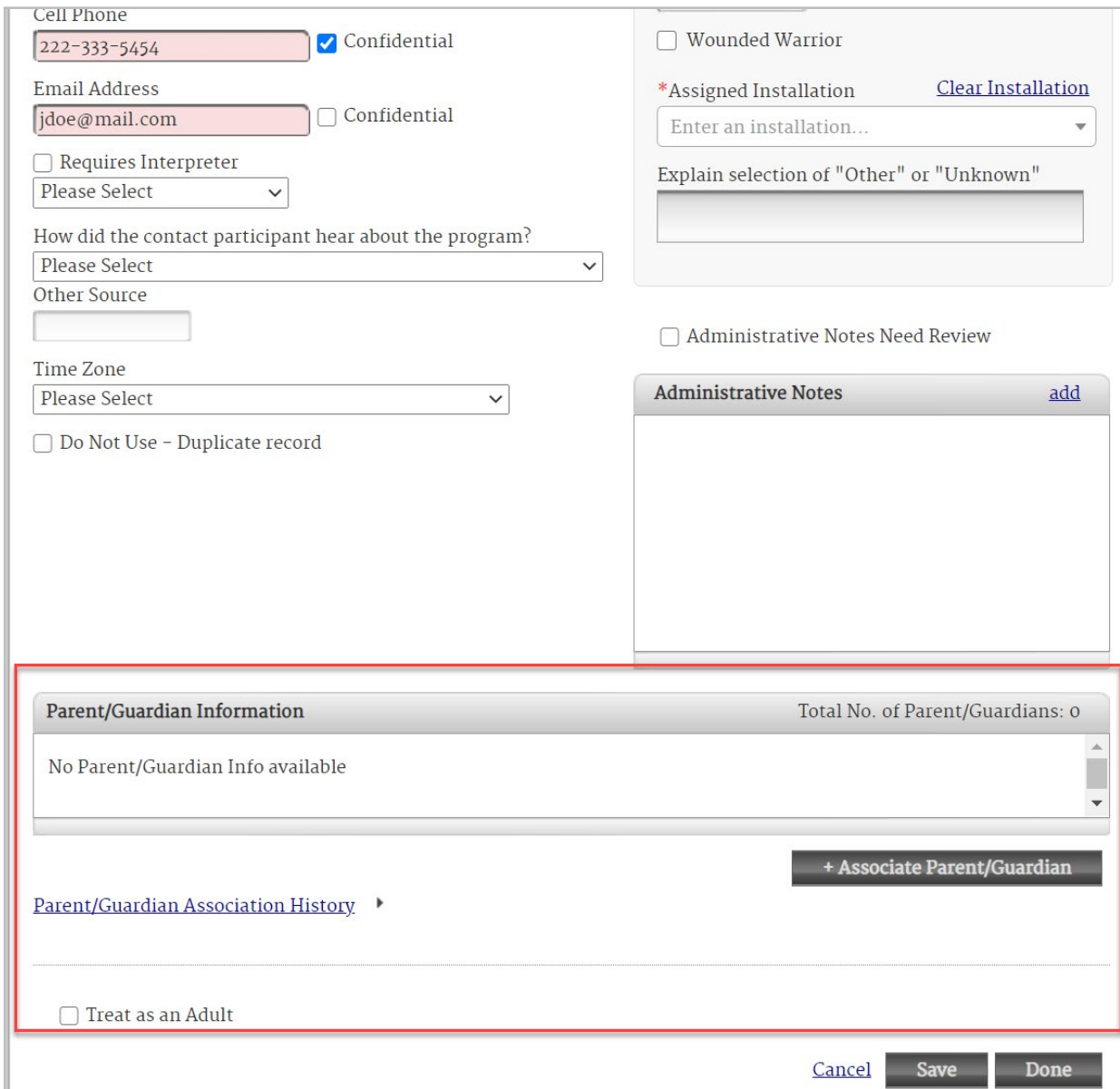
Administrative Notes

[add](#)

Figure 30



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



Cell Phone
222-333-5454 ☒ Confidential

Email Address
jdoe@mail.com ☐ Confidential

☐ Requires Interpreter
Please Select

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

Other Source
Please Select

Time Zone
Please Select

☐ Do Not Use - Duplicate record

☐ Wounded Warrior

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

Explain selection of "Other" or "Unknown"

☐ Administrative Notes Need Review

Administrative Notes [add](#)

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

No Parent/Guardian Info available

[+ Associate Parent/Guardian](#)

[Parent/Guardian Association History](#)

☐ Treat as an Adult

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

Figure 31



5.3. View and Edit a Participant

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

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

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

View Participant

Create CaseEdit

Participant Name and Information

First	Middle	Last	Suffix
Jane	Q	Doe	
DOB	Sex	Marital Status	
2/1/1996	Female	Single	

Current Address

Address			
123 Test Drive			
City	State	Postal Code	
Ville	SD	55555	
Country			
United States			

Telephone

Preferred Phone	Work Phone
111-222-3333	Cell Phone
Confidential	555-555-5555
	Confidential

Email

Email Address
jdoe@mail.com
Confidential

Additional Information

Eligibility Info

Service Member?
Yes

Relation
Self

Pay Grade
E-7

Branch of SVC
Army

Eligibility Status
Active Duty

Separation/Retirement Date

Assigned Installation
Joint Base Langley-Eustis (JBLE)

Administrative Notes

Figure 32

Electronic Case Management System | User Guide

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

How did the contact participant hear about the program?

Community Mental Health Resources

Other Source

Time Zone

Please Select

☐ Do Not Use - Duplicate record

Created By

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

Last Modified By

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

Last Accessed

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

Void

☐ Administrative Notes Need Review

Administrative Notes

[add](#)

[Cancel](#)

Save

Done

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.

The screenshot displays the 'View Participant' interface. On the left is a 'PARTICIPANT OVERVIEW' sidebar, and the main area shows detailed information for 'Jane Q Doe'. Red boxes highlight the 'DOB' field in both the overview and details sections, and a 'Minor Participant' icon in the eligibility section.

Participant Name and Information			
First	Middle	Last	Suffix
Jane	Q	Doe	

DOB	Sex	Marital Status
2/2/2018	Female	Single

Current Address

Address	City	State	Postal Code
123 Test Drive	Ville	SD	55555

Country: United States

Telephone

Preferred Phone	Work Phone
111-222-3333	
Confidential	Cell Phone
	555-555-5555
	Confidential

Email

Email Address
jdoo@mail.com
Confidential

Eligibility Info

Service Member? No

Relation: Family Member Dependent Child

Pay Grade: E-7

Branch of SVC: Army

Eligibility Status: Active Duty

Separation/Retirement Date:

Minor Participant

Assigned Installation: Joint Base Langley-Eustis (JBLE)

Administrative Notes

Figure 34



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

Cell Phone
 ☒ Confidential

Email Address
 ☐ Confidential

☐ Requires Interpreter

Please Select

How did the contact participant hear about the program?

Please Select

Other Source

Time Zone

Please Select

☐ Do Not Use - Duplicate record

☐ Wounded Warrior

*Assigned Installation [Clear Installation](#)

Enter an installation...

Explain selection of "Other" or "Unknown"

☐ Administrative Notes Need Review

Administrative Notes [add](#)

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

No Parent/Guardian Info available

+ Associate Parent/Guardian

[Parent/Guardian Association History](#)

☐ Treat as an Adult

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

Figure 35



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

The screenshot shows the 'View Participant' interface. On the left is a sidebar with 'DASHBOARD' and 'PARTICIPANT OVERVIEW'. The main content area has a title 'View Participant' and buttons for 'Create Case' and 'Edit'. A yellow warning box with a red border and an exclamation mark icon contains the text: 'This participant is a minor, but has not supplied parent/guardian information. Please ask participant if they would like to supply this now.' Below this is a table for 'Participant Name and Information' and a section for 'Eligibility Info'.

Participant Name and Information			
First	Middle	Last	Suffix
Jane	Q	Doe	
DOB	Sex	Marital Status	
2/2/2018	Female	Single	

Eligibility Info
Service Member?
No
Relation

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.

This screenshot is similar to Figure 36 but shows the 'Edit' button highlighted with a red box. The 'Eligibility Info' section now shows 'Service Member?' as 'Yes' and 'Relation' as 'Self'.

Participant Name and Information			
First	Middle	Last	Suffix
Jane	Q	Doe	
DOB	Sex	Marital Status	
2/1/1996	Female	Single	

Eligibility Info
Service Member?
Yes
Relation
Self

Figure 37



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

Edit Participant

* indicates a required field

*First

Middle

*Last

Suffix

Jane

Q

Doe

*DOB

*Sex

*Marital Status

02/02/2018

Female

Single

Current Address

123 Test Drive

Address (continued)

City

State

Postal Code

Country

Ville

SD

55555

United State

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 DESIROY - RECORDS HOLD

Created By

- 2/24/2025 8:01:20 PM

Last Modified By

- 2/24/2025 8:09:42 PM

Last Accessed

- 2/24/2025 8:09:43 PM

Data Retention Modified Date

2/24/2025 8:09:42 PM

Eligibility Information

*Service Member?

☐ Yes

☒ No

*Relation

Family Member Dependent Child

*Branch of SVC

Army

*Pay Grade

E-7

*Eligibility Status

Active Duty

Separation/Retirement Date

☐ Wounded Warrior

*Assigned Installation

Joint Base Langley-Eustis (JB...

Explain selection of "Other" or "Unknown"

☐ Administrative Notes Need Review

Administrative Notes

[add](#)

Parent/Guardian Information

Total No. of Parent/Guardians: 0

No Parent/Guardian Info available

+ Associate Parent/Guardian

Parent/Guardian Association History

Figure 38



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

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

Add New or Associate Parent/Guardian

First Middle Last
First Middle zee

Phone DOB Email
Phone Email

Search **Clear**

Parent/guardian search found 5 parent/guardians

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

0 parent/guardian(s) selected for association

Cancel **Associate and Close** **+ Add New**

Figure 39

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

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



6.4. Create Parent/Guardian for Minor Participant

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

Lisa - 4/17/2021 9:02:52 PM

Last Accessed

Lisa - 4/17/2021 9:01:20 PM

Parent/Guardian Information

Total No. of Parent/Guardians: 0

No Parent/Guardian Info available

+ Associate Parent/Guardian

[Parent/Guardian Association History](#)

☐ Treat as an Adult

Void

[Cancel](#)

Save

Done

Figure 40



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

Add New or Associate Parent/Guardian

First Middle Last
First Middle zee

Phone DOB Email
Phone Email

Search **Clear**

Parent/guardian search found 5 parent/guardians

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

0 parent/guardian(s) selected for association

Cancel **Associate and Close** **+ Add New**

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.



Branch of SVC: Armyv Other Source

Add New Parent/Guardian

*First: Bill Middle: Suffix: *Last: Zee

*DOB: 02/02/1966 *Sex: Male *Marital Status: Married

Current Address: [Same As Participant](#)
123 Drive Lane

Address (continued):

City: Lake State: IA Postal Code: 12345 Country: United States

Affiliation: Guardian

Preferred Phone: 555-555-5555 ☐ Confidential

Work Phone:

Cell Phone: 444-444-4444 ☐ Confidential

Email Address: bzee2@gmail.com ☐ Confidential

☐ Requires Interpreter
Please Select

Buttons: Cancel Back to Search **Save and Associate**

Figure 42

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

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



6.5. Associate Existing Parent/Guardian With Minor Participant

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

Lisa - 4/17/2021 9:02:52 PM

Last Accessed

Lisa - 4/17/2021 9:01:20 PM

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

No Parent/Guardian Info available

+ Associate Parent/Guardian

[Parent/Guardian Association History](#)

☐ Treat as an Adult

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

Figure 43

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

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



Current Address
123 Happy Street

*Relation
Guardian

Add New or Associate Parent/Guardian

First Middle Last
First Middle zee

Phone DOB Email
Phone Email

Search **Clear**

Parent/guardian search found 5 parent/guardians

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

2 parent/guardian(s) selected for association

Cancel **Associate and Close** + Add New

Figure 44

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



6.6. Working With the Parent/Guardian Information Container

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

6.6.1. VIEW ASSOCIATED PARENT/GUARDIANS

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

Parent/Guardian Information

Total No. of Parent/Guardians: 1

▼ Zee, Bill

Affiliation: Guardian

First	Middle	Last	Suffix
Bill		Zee	
DOB	Sex	Marital Status	
2/2/1966	Male	Married	
Affiliation			
Guardian			
Current Address			
Address			
123 Drive Lane			
City	State	Postal Code	Country
Lake	IA	12345	United States
Telephone			
Preferred Phone	Work Phone	Cell Phone	
555-555-5555		444-444-4444	
Email			
Email Address			
bzee2@gmail.com			

[Parent/Guardian Association History](#) ▶

Figure 45



6.6.2. EDIT ASSOCIATED PARENT/GUARDIANS

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

Parent/Guardian Information

Total No. of Parent/Guardians: 1

▼ Zee, Bill

Affiliation: Guardian

[Remove Association](#)

[Edit](#)

First

Middle

Last

Suffix

Bill

Zee

DOB

Sex

Marital Status

2/2/1966

Male

Married

Affiliation

Guardian

Current Address

Address

123 Drive Lane

City

State

Postal Code

Country

Lake

IA

12345

United States

Telephone

Preferred Phone

Work Phone

Cell Phone

555-555-5555

444-444-4444

Email

Email Address

bzee2@gmail.com

+ Associate Parent/Guardian

[Parent/Guardian Association History](#)

▶

Figure 46



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

Edit Associated Parent/Guardian

*First: Bill Middle: Suffix: *Last: Zee

*DOB: 02/02/1966 *Sex: Male *Marital Status: Married

Preferred Phone: 555-555-5555 ☐ Confidential

Work Phone:

Cell Phone: 444-444-4444 ☐ Confidential

Email Address: bze2@gmail.com ☐ Confidential

☐ Requires Interpreter

Current Address: [Same As Participant](#)

123 Drive Lane

Address (continued):

City: Lake State: IA Postal Code: 12345 Country: United States

Affiliation: Guardian

Clicking 'Save' will save the parent/guardian record only

Figure 47



6.6.3. REMOVE ASSOCIATION WITH PARENT/GUARDIAN

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

Parent/Guardian Information

Total No. of Parent/Guardians: 1

▼ Zee, Bill

Affiliation: Guardian

[Remove Association](#)

[Edit](#)

First

Middle

Last

Suffix

Bill

Zee

DOB

Sex

Marital Status

2/2/1966

Male

Married

Affiliation

Guardian

Current Address

Address

123 Drive Lane

City

State

Postal Code

Country

Lake

IA

12345

United States

Telephone

Preferred Phone

Work Phone

Cell Phone

555-555-5555

444-444-4444

Email

Email Address

bzee2@gmail.com

+ Associate Parent/Guardian

Parent/Guardian Association History

Figure 48



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

Parent/Guardian Information

Total No. of Parent/Guardians: 1

▶ zee, Bob	Remove Association	Edit
------------	------------------------------------	----------------------

+ Associate Parent/Guardian

[Parent/Guardian Association History](#) ▶

Figure 49



6.7. Understanding Parent/Guardian Association History

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

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

Figure 50



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

+ Associate Parent/Guardian

[Parent/Guardian Association History](#) ▼

Parent/Guardian Association History

Parent/Guardian Name	Action Performed	User Name	Date/Time
Zee, Oscar	Association removed	Lisa	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

☐ Treat as an Adult

Figure 51



7. Creating Cases

7.1. Overview

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

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

Figure 52

The following case types can be created in the eCMS:

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



- » Elder Care
- » Education
- » Adult Disability
- » Adoption

■ Consultation-Based

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

7.2. Create a Crisis Case

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

Search

First Name First Name	Middle Name MI	Last Name Last Name	Participant ID Participant ID
Phone Phone	DOB 	Search Type Participant	Case Number Case ID
Primary Email Email			Search Clear

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

CRISIS / DTW / MR
QUICK TRACKER

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.

The screenshot shows a web form titled "Search" at the top. On the left is a sidebar with a red vertical bar labeled "CRISIS/DTW/MR" and a list of links: "don", "don", "eldon", "eldon", "to", "on", "on", "an Flo". The main content area has a red border. It contains two sections: "Duty to Warn" and "Mandated Report".

Duty to Warn

- ☐ Police
- ☐ Base Police
- ☐ EMS
- ☐ Medical Facility
- ☐ Followed Internal Workflow

Mandated Report

- ☐ Adult Protective Services
- ☐ Child Protective Services
- ☐ Civilian Expeditionary Command
- ☐ FAP (Installation Domestic Abuse, Child Abuse)
- ☐ Followed Internal Workflow
- ☐ Reserve, Guard or Recruiting POC
- ☐ SARC

Limits of Confidentiality Explained

☐ Limits of Confidentiality Explained

"Please be advised the information you provide to me or other counselors will be kept confidential, except to meet legal obligations or to prevent harm to self or others. Legal obligations include requirements of law and DoD or military regulations. Harm to self or others include suicidal thoughts or intent, a desire to harm oneself, domestic violence, child abuse or neglect, violence against any person, including sexual assault involving service members, and any present or future illegal activity."

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

First Middle Last

Home Phone DOB

Figure 54

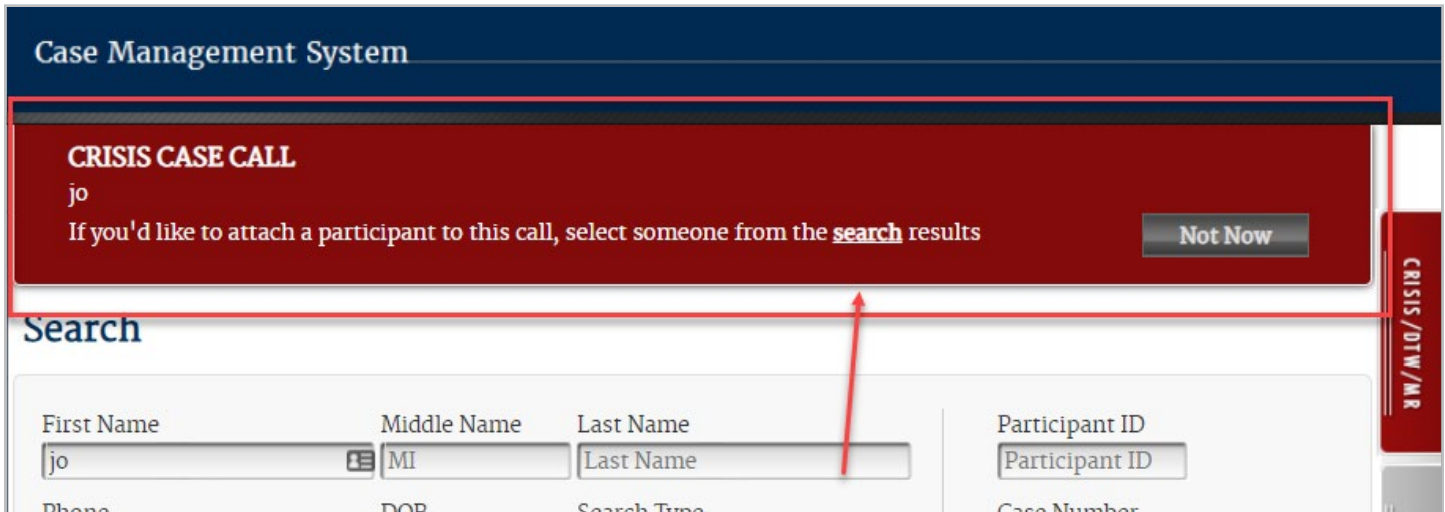
In the left panel, select all items that apply to the call before saving the form.

This screenshot is identical to Figure 54, showing the same form structure. The left sidebar and the "Duty to Warn" and "Mandated Report" sections are highlighted with a red border, indicating that these are the sections to be interacted with according to the instructions.

Figure 55



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



Case Management System

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

Search

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

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.



DASHBOARD

PARTICIPANT OVERVIEW

Name
Jane Q Doe

Participant ID
1518748

Current Address
123 Test Drive
Ville, SD 55555
United States

CRISIS CASE CALL
Jane Doe 111-222-3333 2/2/2018
Attach this person to a crisis call? Yes No

View Participant Create Case Edit

Participant Name and Information

First	Middle	Last	Suffix
Jane	Q	Doe	
DOB	Sex	Marital Status	
2/2/2018	Female	Single	

Eligibility Info
Service Member?
No
Relation

Figure 57



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

Case Management System

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

Search

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

Figure 58

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

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

DASHBOARD

UNATTACHED CRISIS CALLS

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

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

Search

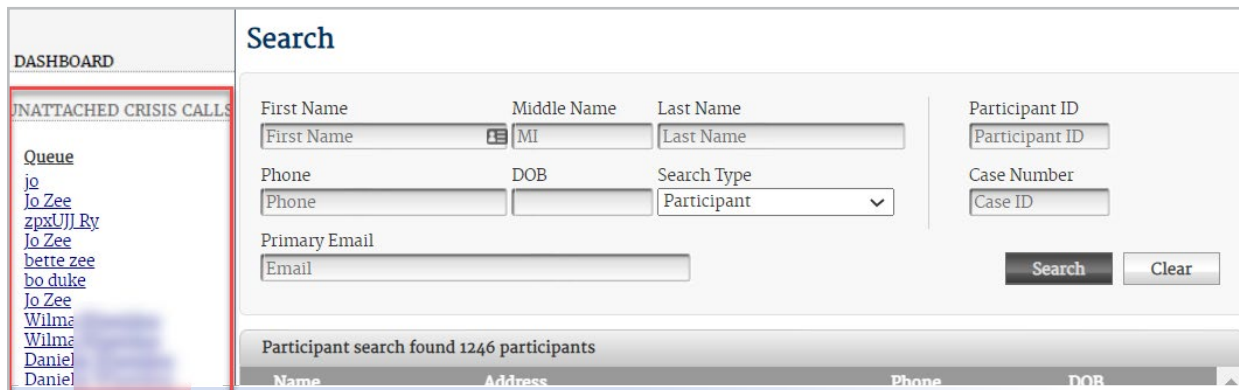
First Name	Middle Name	Last Name	Participant ID
jo	MI	Last Name	Participant ID
Phone	DOB	Search Type	Case Number
Phone		Participant	Case ID

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.



DASHBOARD

UNATTACHED CRISIS CALLS

Queue

- jo
- Jo Zee
- zpxUJl Ry
- Jo Zee
- bette zee
- bo duke
- Jo Zee
- Wilma
- Wilma
- Daniel
- Daniel

Search

First Name: Middle Name: Last Name:

Phone: DOB: Search Type:

Primary Email:

Participant ID: Case Number: Case ID:

Search **Clear**

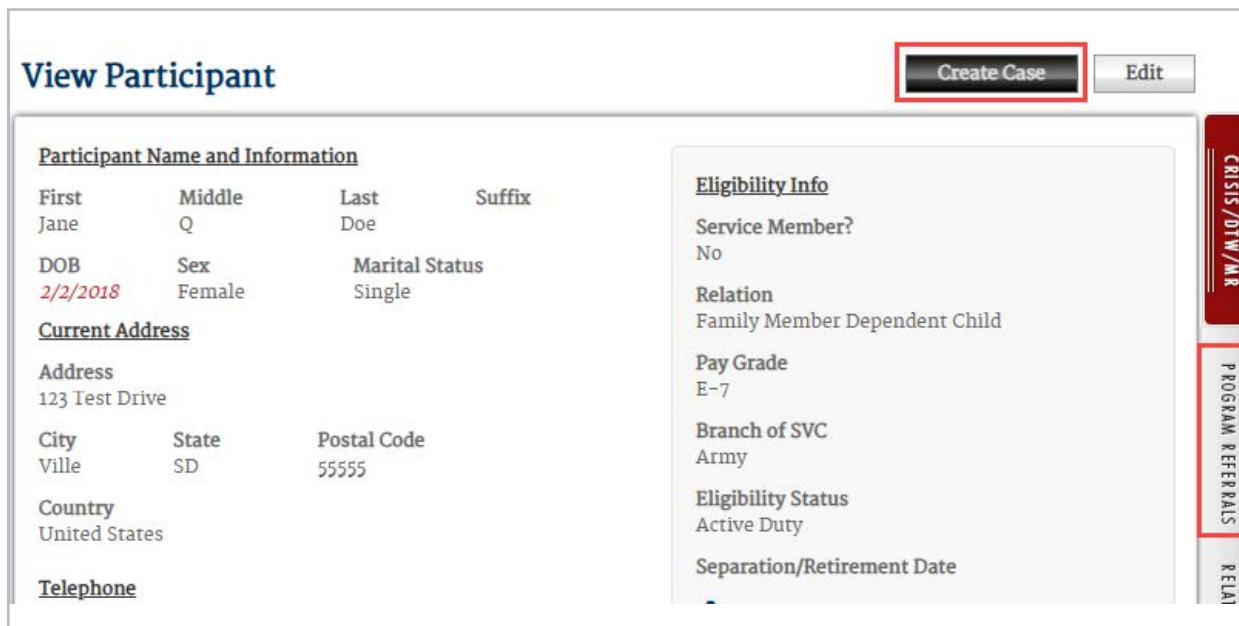
Participant search found 1246 participants

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

Figure 60

7.3. Create a Non-Medical Counseling Case

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



View Participant **Create Case** **Edit**

Participant Name and Information

First	Middle	Last	Suffix
Jane	Q	Doe	

DOB **Sex** **Marital Status**

2/2/2018 Female Single

Current Address

Address

123 Test Drive

City **State** **Postal Code**

Ville SD 55555

Country

United States

Telephone

Eligibility Info

Service Member?

No

Relation

Family Member Dependent Child

Pay Grade

E-7

Branch of SVC

Army

Eligibility Status

Active Duty

Separation/Retirement Date

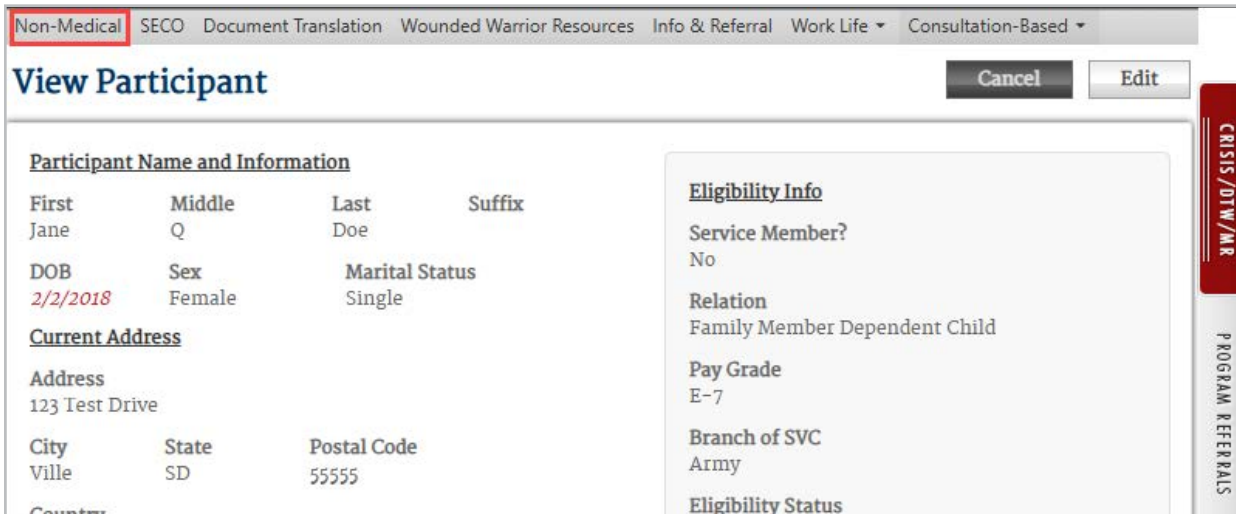
CRISIS/DIW/MR

PROGRAM REFERRALS

RELAT



Select “Non-Medical.”



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

View Participant

Participant Name and Information

First	Middle	Last	Suffix
Jane	Q	Doe	

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

Current Address

Address
123 Test Drive

City	State	Postal Code
Ville	SD	55555

Country

Eligibility Info

Service Member?
No

Relation
Family Member Dependent Child

Pay Grade
E-7

Branch of SVC
Army

Eligibility Status

CRISIS/OTW/MR
PROGRAM REFERRALS

Figure 61

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

Non-Medical Counseling

Family member of those diagnosed with a mental disorder may be eligible for non-medical counseling. These are to be used for NON-CRISIS situations. If this is a CRISIS situation, then please use the Crisis Call Drawer to the right of the screen.

☐ Limits of Confidentiality Explained

“Please be advised the information you provide to me or other counselors will be kept confidential, except to meet legal obligations or to prevent harm to self or others. Legal obligations include requirements of law and DoD or military regulations. Harm to self or others include suicidal thoughts or intent, a desire to harm oneself, domestic violence, child abuse or neglect, violence against any person, including sexual assault involving service members, and any present or future illegal activity.”

“Do you understand everything I just read to you?”

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

AIR FORCE SERVICE MEMBERS AND FAMILY MEMBERS ONLY:

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

Figure 62



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

DASHBOARD

PARTICIPANT OVERVIEW

Name 

Jo Marie Zee

Participant ID

585069

Current Address

123 Happy Street
Apt 2
Awesomeville, PA 12345
United States

Preferred Phone

2-222-222-2221
Confidential

Work Phone

3-333-333-3333

Cell Phone

444-444-4444
Confidential

Email Address

BestEmailAddress@AwesomeEmails.com

DOB

2/19/2004

Service Member?

Yes

Relation

Guardian

Pay Grade

W-3

Branch of SVC

Army National Guard

Eligibility Status

Active Duty

Assigned Installation

Camp Parks Reserve
Forces Training Area

PARENT/GUARDIAN INFO

Name

Bob zee

Non-Medical Counseling

Family member of those diagnosed with a mental disorder may be eligible for non-medical counseling. These are to be used for NON-CRISIS situations. If this is a CRISIS situation, then please use the Crisis Call Drawer to the right of the screen.

☐ Limits of Confidentiality Explained

"Please be advised the information you provide to me or other counselors will be kept confidential, except to meet legal obligations or to prevent harm to self or others. Legal obligations include requirements of law and DoD or military regulations. Harm to self or others include suicidal thoughts or intent, a desire to harm oneself, domestic violence, child abuse or neglect, violence against any person, including sexual assault involving service members, and any present or future illegal activity."

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

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

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

Minor Participant - Parent/Guardian Info

*Case Initiated by Parent/Guardian? ☐ Yes ☐ No

Parent/Guardian(s) Permitted to Discuss Case

Parent/Guardian Name

Please Select

Please Select

Add Option

"What prompted your call for counseling today?"

*Presenting Problem

Please Select

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

"Have you ever received any mental health treatment?"

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

Referral Assessment

Select all that apply:

☐ Participant's Risk to Self

☐ Domestic Abuse

☐ Participant's Risk to Others

☐ Child Abuse

Figure 63



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



Minor Participant – Parent/Guardian Info

***Case Initiated by Parent/Guardian?** ☒ Yes ☐ No

***Parent/Guardian Name** zee, Bob

Parent/Guardian(s) Permitted to Discuss Case

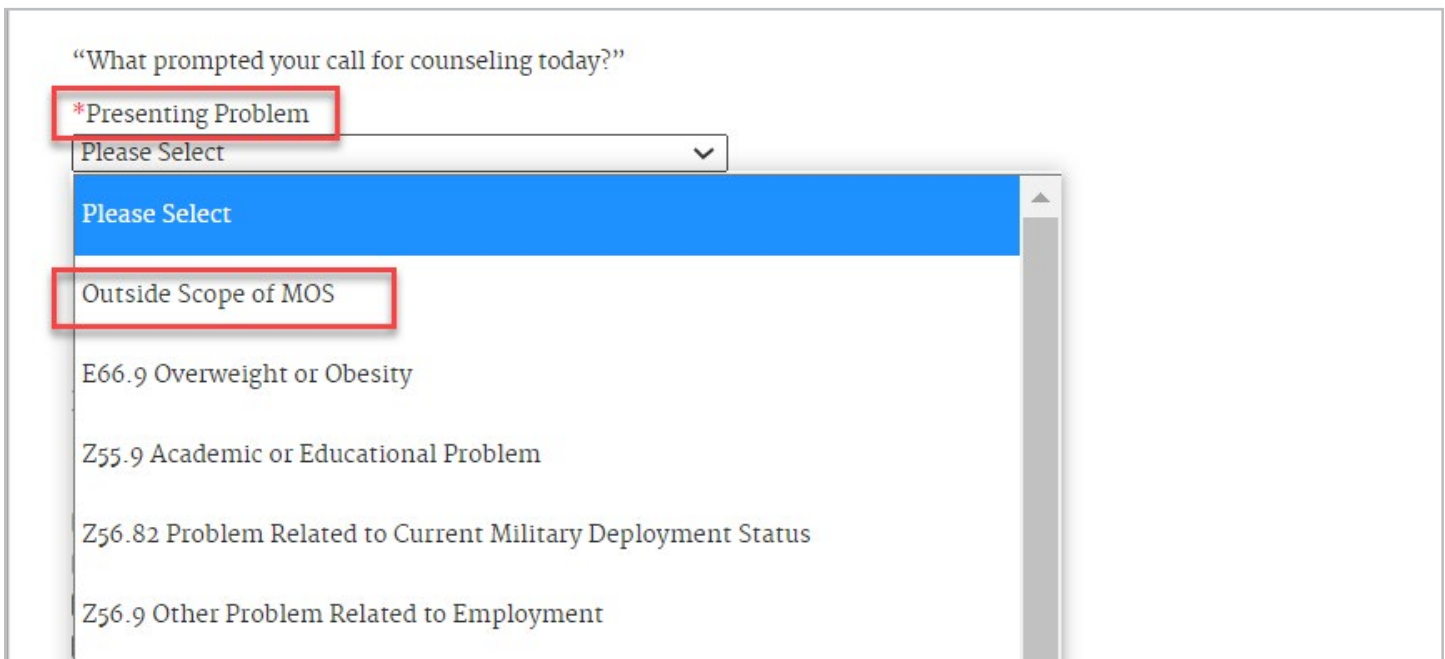
zee, Bob [Remove](#)

Please Select

[Add Option](#)

Figure 64

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



“What prompted your call for counseling today?”

***Presenting Problem**

Please Select

Please Select

Outside Scope of MOS

E66.9 Overweight or Obesity

Z55.9 Academic or Educational Problem

Z56.82 Problem Related to Current Military Deployment Status

Z56.9 Other Problem Related to Employment

Figure 65



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

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

“What prompted your call for counseling today?”

*Presenting Problem

Please Select

Please Select

Outside Scope of MOS

E66.9 Overweight or Obesity

Z55.9 Academic or Educational Problem

Z56.82 Problem Related to Current Military Deployment Status

Z56.9 Other Problem Related to Employment

Figure 66

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

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

Referrals

Select all that apply:

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

Tracked Event(s)

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

Figure 67



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

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

The screenshot shows a form with the following fields and options:

- *Handoff Type**: A dropdown menu with "Please Select" as the current selection.
- Participant has insurance**: ☐
- Participant declined referral**: ☐
- Participant terminated call**: ☐
- Assigned to**: A dropdown menu with "Please Select" as the current selection.
- *Deployment Status**: A dropdown menu with "Please Select" as the current selection.
- Interpreter Requested**: ☐
- Language**: A dropdown menu with "Please Select" as the current selection.
- In-Theater**: ☐
- Who referred the participant to this Military OneSource service?**: A dropdown menu with "Please Select" as the current selection.
- Handoff Notes**: A text area with a character count of "0 of 32000 characters" and a link to "Handoff Notes History".
- Urgent**: A checkbox that is checked, indicated by a red arrow.

Figure 68

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

The screenshot shows a form titled "Participant Follow-Up and Feedback" with the following fields and options:

- *Appointment Secured Follow-Up**: A dropdown menu with "Please Select" as the current selection.
- Follow-Up Date**: A date picker showing "15".
- Additional Follow-Up or Feedback Information**: A text area with a character count of "0 of 50 characters".
- Agrees**: ☐
- Declines**: ☐
- No Follow-Up Needed**: ☐
- Buttons**: "Cancel", "Save", and "Done".

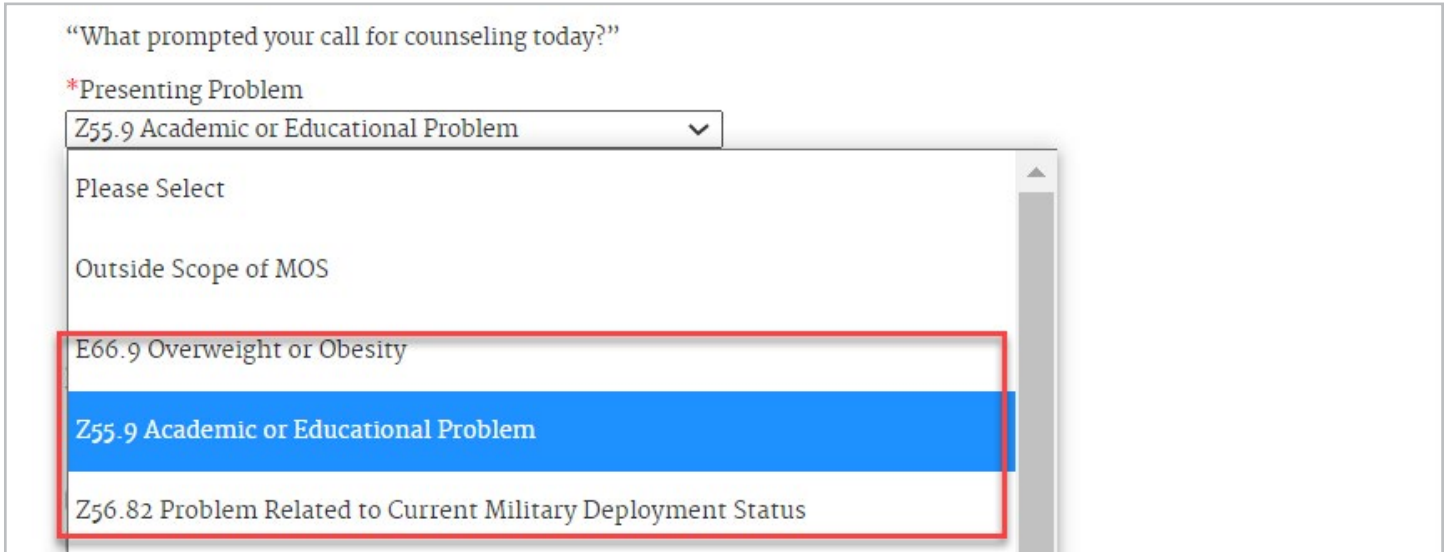
Figure 69

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



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

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



“What prompted your call for counseling today?”

*Presenting Problem

Z55.9 Academic or Educational Problem ▼

Please Select

Outside Scope of MOS

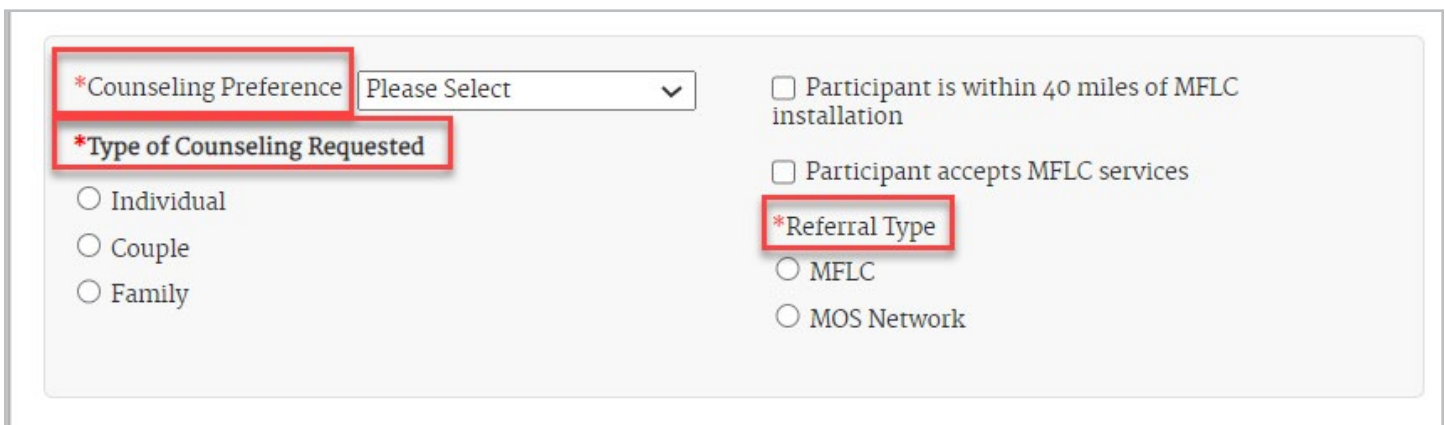
E66.9 Overweight or Obesity

Z55.9 Academic or Educational Problem

Z56.82 Problem Related to Current Military Deployment Status

Figure 70

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



*Counseling Preference Please Select ▼

*Type of Counseling Requested

☐ Individual

☐ Couple

☐ Family

☐ Participant is within 40 miles of MFLC installation

☐ Participant accepts MFLC services

*Referral Type

☐ MFLC

☐ MOS Network

Figure 71

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



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

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

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

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

Figure 72



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

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

The screenshot shows a web form for case management. At the top left is the Department of Defense seal. The form contains several fields: a dropdown for '*Handoff Type' (highlighted with a red box), a dropdown for 'Assigned to', a dropdown for '*Deployment Status' (highlighted with a red box), a checkbox for 'Interpreter Requested', a dropdown for 'Language', a checkbox for 'In-Theater', a dropdown for 'Who referred the participant to this Military OneSource service?', and a large text area for 'Handoff Notes' (highlighted with a red box). To the right of the text area is a checkbox for 'Urgent'. Below the text area, it says '0 of 32000 characters' and there is a link for 'Handoff Notes History'.

Figure 73



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

Participant Follow-Up and Feedback

***Appointment Secured Follow-Up**

☒ Agrees

☐ Phone Call

☐ Text

☐ Declines

☐ No Follow-Up Needed

Follow-Up Date

Additional Follow-Up or Feedback Information

0 of 50 characters

***Satisfaction Feedback**

☒ Agrees
(Choose both if applicable)

☐ Phone Call

☐ E-mail

☐ Declines

☐ N/A (use when participant is under 18)

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

Figure 74

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



7.4. Create a SECO Triage Case

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

View Participant

Create Case

Edit

Participant Name and Information

First	Middle	Last	Suffix
Jane	Q	Doe	
DOB	Sex	Marital Status	
2/2/2018	Female	Single	

Current Address

Address		
123 Test Drive		
City	State	Postal Code
Ville	SD	55555
Country		
United States		
Telephone		

Eligibility Info

Service Member?	No
Relation	Family Member Dependent Child
Pay Grade	E-7
Branch of SVC	Army
Eligibility Status	Active Duty
Separation/Retirement Date	

CRISIS /DTW/MR

PROGRAM REFERRALS

RELAT

Figure 75



Select "SECO."

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

View Participant

Cancel Edit

Participant Name and Information

First	Middle	Last	Suffix
Jane	Q	Doe	
DOB	Sex	Marital Status	
2/2/2018	Female	Single	

Current Address

Address		
123 Test Drive		
City	State	Postal Code
Ville	SD	55555
Country		

Eligibility Info

Service Member?
No

Relation
Family Member Dependent Child

Pay Grade
E-7

Branch of SVC
Army

Eligibility Status

CRISIS/DTW/MR
PROGRAM REFERRALS

Figure 76



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

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

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

SECO Triage

Tracked Event(s)

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

***Handoff Type**
Please Select ▼

***When did the handoff occur?**
Please Select ▼
Assigned to
Please Select ▼

Interpreter Requested ☐

Language
Please Select ▼

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

Handoff Notes

0 of 32000 characters

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

Figure 77



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

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

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

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

SECO TriageCase ID: 985193 (Active)

Tracked Event(s)
None

Handoff Type
None – Participant Requests Callback

When did the handoff occur?
During Working Hours

Assigned to

Please Select

Language

☐ Interpreter Requested

Please Select

Who referred the participant to this Military OneSource service?

Command

Handoff Notes

☐ Urgent

rg et re ter ertt rte

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

[Assignment History](#)

Service Member Name

0 of 50 characters

☐ MyCAA Eligible

☐ MyCAA Registered

☐ MyCAA Participant

☐ MSEP Registered

☐ MyCAA Manadatory Counseling Complete

SECO Service Request (select all that apply)

☐ SECO Information & Referral

☐ SECO Specialty Consult

Figure 78



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

SECO Service Request (select all that apply)

☒ SECO Information & Referral

SECO I&R

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

0 of 50 characters
Comments

0 of 32000 characters

☐ SECO Specialty Consult

Figure 79



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

Service Member Name
0 of 50 characters

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

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

Figure 80

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

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

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



SECO Specialty Consult

Tracked Event(s)

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

Handoff Type* **Assigned To**

Please Select Please Select

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

15 0 of 50 characters

Handoff Notes ☐ **Urgent**

Figure 81

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



7.6. Create a Document Translation Case

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

View Participant

Create Case**Edit**

Participant Name and Information

First	Middle	Last	Suffix
Jane	Q	Doe	
DOB	Sex	Marital Status	
2/2/2018	Female	Single	

Current Address

Address
123 Test Drive

City	State	Postal Code
Ville	SD	55555
<u>Country</u> United States		

Telephone

Eligibility Info

Service Member?
No

Relation
Family Member Dependent Child

Pay Grade
E-7

Branch of SVC
Army

Eligibility Status
Active Duty

Separation/Retirement Date
-

CRISIS/DTW/MR

PROGRAM REFERRALS

RELAT

Figure 82

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Select "Document Translation."

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

View Participant Cancel Edit

Participant Name and Information

First	Middle	Last	Suffix
Jane	Q	Doe	
DOB	Sex	Marital Status	
2/2/2018	Female	Single	

Current Address

Address
123 Test Drive

City	State	Postal Code
Ville	SD	55555
Country		

Eligibility Info

Service Member?
No

Relation
Family Member Dependent Child

Pay Grade
E-7

Branch of SVC
Army

Eligibility Status

CRISIS/DTW/MR
PROGRAM REFERRALS

Figure 83



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

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

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

Document Translation

Tracked Event(s)

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

Documents

Document Type*
Please Select

From Language*
Please Select

No. of Pages*

Details of Other

To Language*
Please Select

Document will be delivered via:
Please Select

Document will be returned via:
Please Select

Who does the document belong to?*

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

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

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

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

Add Document

Figure 84

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



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

***Handoff Type**
Please Select

***Deployment Status**
Please Select

Assigned to
Please Select

Interpreter Requested ☐ Language
Please Select

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

Handoff Notes

0 of 32000 characters

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

Figure 85

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



7.7. Create Other Case Types

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

View Participant

Create Case **Edit**

<u>Participant Name and Information</u>			
First	Middle	Last	Suffix
Jane	Q	Doe	
DOB	Sex	Marital Status	
2/2/2018	Female	Single	
<u>Current Address</u>			
Address			
123 Test Drive			
City	State	Postal Code	
Ville	SD	55555	
Country			
United States			
<u>Telephone</u>			

<u>Eligibility Info</u>
Service Member?
No
Relation
Family Member Dependent Child
Pay Grade
E-7
Branch of SVC
Army
Eligibility Status
Active Duty
Separation/Retirement Date

CRISIS/DTW/MR
PROGRAM REFERRALS
REL

Figure 86

Select the case type you want to create.

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

View Participant

Cancel **Edit**

<u>Participant Name and Information</u>			
First	Middle	Last	Suffix
Jane	Q	Doe	
DOB	Sex	Marital Status	
2/2/2018	Female	Single	
<u>Current Address</u>			
Address			
123 Test Drive			

<u>Eligibility</u>
Service M
No
Relation
Family Member Dependent Child
Pay Grade
E-7

CRISIS/DTW/MR
PROGRAM

- Work Life
- Financial
- Tax
- Elder Care
- Education
- Adult Disability
- Adoption

Figure 87



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

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

View Participant

Participant Name and Information

First	Middle	Last	Suffix
Jane	Q	Doe	
DOB	Sex	Marital Status	
2/2/2018	Female	Single	

Current Address

Address

123 Test Drive

City	State	Postal Code
Ville	SD	55555
Country		

Eligibility Info

Service Member?
No

Relation
Family Member Dependent Child

Pay Grade
E-7

Branch of SVC
Army

Eligibility Status

CRISIS/DTW/MR
PROGRAM REFERRALS

Figure 88

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

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

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



Tracked Event(s)

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

Select the referrals needed for the participant below:

☐ Career

☐ Community Resources

☐ Financial Assistance

☐ Government Program

☐ Household Services

☐ Housing

☐ Legal

☐ Non-Referral General Information

☐ Pets

☐ Official Travel

☐ Unofficial Travel

***Handoff Type**

Please Select

Assigned to

Please Select

***Deployment Status**

Please Select

Interpreter Requested

☐

Language

Please Select

Who referred the participant to this Military OneSource service?

Please Select

Handoff Notes

☐ Urgent

0 of 32000 characters

[Cancel](#)

Save

Done

Figure 89

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



7.8. Accessing Participant's Existing Cases

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

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

View Participant

CancelEdit

Participant Name and Information

First	Middle	Last	Suffix
Jane	Q	Doe	
DOB	Sex	Marital Status	
2/2/2018	Female	Single	

Current Address

Address

123 Test Drive

City	State	Postal Code
Ville	SD	55555

Country

United States

Telephone

Preferred Phone	Work Phone
111-222-3333	Cell Phone
Confidential	555-555-5555
	Confidential

Eligibility Info

Service Member?

No

Relation

Family Member Dependent Child

Pay Grade

E-7

Branch of SVC

Army

Eligibility Status

Active Duty

Separation/Retirement Date

Minor Participant

Assigned Installation

Joint Base Langley-Eustis (JBLE)

CRISIS/OTW/MR

PROGRAM REFERRALS

RELATED CASES

NOTES

Figure 90



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

Related Cases

Related Cases				
Case Id	Case Name	Date Opened	Date Modified	Status
▶ 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.

Related Cases

Case Id	Case Name	Date Opened	Date Modified	Status
	healthy			Active
984735	Specialty Consult: Building Healthy Relationships	1/28/2021	4/26/2021	Active

5 10 20

Done

Figure 92

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

Related Cases

Case Id	Case Name	Date Opened	Date Modified	Status
984735	Specialty Consult: Building Healthy Relationships	1/28/2021	4/26/2021	Active

5 10 20 30

Done

Figure 93



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

Related Cases

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

Figure 94



8. Managing Cases and Sessions

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

8.1. Overview

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

8.2. Manage Non-Medical Counseling Cases

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

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



Scope Determination:

Outside Scope for Non-Medical Counseling

Referrals

Community Service

Participant has insurance

No

Participant declined referral

No

Participant terminated call

No

Tracked Event(s)

None

Handoff Type

Warm Handoff

[Handoff Notes History](#) ▶

Participant Follow-Up and Feedback

*Appointment Secured Follow-Up Follow-Up Date

☐ Agrees

☒ Declines

☐ No Follow-Up
Needed

Additional Follow-Up or Feedback
Information

0 of 50 characters

[Follow-Up History](#) ▶

☐ Unable to schedule for appointment within 3 business
days

Closing Reason

Please Select ▼

☐ Completed

Contact Notes

[add](#)

Void

[Cancel](#)

Save

Done

Figure 95



For cases that are [“In Scope for Non-Medical Counseling,”](#) information for the MOS Network Provider should be entered once known.

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

In Scope
Counseling Preference: In-person NmcoCounselingPreferenceBack
Type of Counseling Requested: Couple
Handoff Type: None – Participant Requests Callback
Participant is within 40 miles of MFLC installation: No
Participant accepts MFLC services: No
Referral Type: MOS Network
Tracked Event(s)
None

MOS Network [Handoff Notes History](#) ▾
Authorization Number: *Provider Name:
Reason Requesting Counseling: needed Phone:
*Location:

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

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

+ Add Session

Figure 96



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

+ Add Session

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

*Appointment Secured Follow-Up

Agrees

- Phone Call

*Satisfaction Feedback

Agrees

- E-mail

Follow-Up or Feedback Date	Additional Follow-Up or Feedback Information	Follow-Up / Feedback Outcome
4/27/2021		Please Select ☐ Completed

[Follow-Up History](#) ▶

Figure 97

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

The screenshot shows a web form for managing follow-up and feedback. At the top right is a button labeled "+ Add Session". Below it, a status line reads "Participant prefers not to be contacted for follow-up: No". The form is divided into two main sections: "*Appointment Secured Follow-Up" and "*Satisfaction Feedback".

In the "*Appointment Secured Follow-Up" section, there is a radio button for "Agrees" with a sub-option for "Phone Call". Below this is a field for "Follow-Up or Feedback Date" with the value "4/27/2021". To the right is a field for "Additional Follow-Up or Feedback Information". Further right is a dropdown menu for "Follow-Up / Feedback Outcome" with the text "Please Select" and a downward arrow. To the right of this dropdown is a checked checkbox labeled "Completed".

The "*Satisfaction Feedback" section has a radio button for "Agrees" with a sub-option for "E-mail".

Below these sections is a heading "Participant Follow-Up and Feedback". Under this heading, there are two columns. The left column is for "*Appointment Secured Follow-Up" and includes radio buttons for "Agrees" (selected), "Declines", and "No Follow-Up Needed". The "Agrees" option has sub-options for "Phone Call" and "Text". There is also a date field with the value "15". The right column is for "*Satisfaction Feedback" and includes radio buttons for "Agrees" (selected), "Declines", and "N/A (use when participant is under 18)". The "Agrees" option has sub-options for "Phone Call" and "E-mail" (checked). There is a text area for "Additional Follow-Up or Feedback Information" with a character count "0 of 50 characters".

At the bottom left of the form is a link labeled "Follow-Up History" with a right-pointing arrow.

Figure 98

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

The screenshot shows a form for entering session information. At the top left is a section for "MOS Network" with an "Edit" button. To the right is a link labeled "Handoff Notes History" with a right-pointing arrow. Below these are two columns of text. The left column contains "Authorization Number:" and "Reason Requesting Counseling: need". The right column contains "*Provider Name: jim smith", "Phone: 444-555-4545", and "*Location: here". At the bottom right of the form is a button labeled "+ 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.

The screenshot shows the 'Create New Session' form. The 'Counseling Preference*' dropdown is set to 'In-person NmcoCounseli'. The 'Date of Service*' field has a calendar icon. The 'Authorization Number' field has a calendar icon. The 'No-Show' checkbox is checked and highlighted with a red box. The 'Escalated To Crisis' checkbox is unchecked. The 'Final Session' checkbox is unchecked. The 'Cancel' and 'Done' buttons are at the bottom right.

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.

The screenshot shows the 'Create New Session' form. The 'Counseling Preference*' dropdown is set to 'In-person NmcoCounseli'. The 'Date of Service*' field has a calendar icon. The 'Authorization Number' field has a calendar icon. The 'Escalated To Crisis' checkbox is checked and highlighted with a red box. The 'No-Show' checkbox is unchecked. Below these fields are several text input fields for counselor information: 'MOS Counselor's First Name', 'MOS Counselor's Middle Initial', '*MOS Counselor's Last Name', '*MOS Counselor's City', '*MOS Counselor's State', 'MOS Counselor's Postal Code', and '*Counselor's Phone'. At the bottom, the '*Military Identification Card Viewed and Verified by Provider' checkbox is checked and highlighted with a red box, followed by 'Yes' and 'No' radio buttons.

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.

Assessed Problem Category

Please Select

Presenting and Assessed Problems*

Z55.9 Academic or Educational Problem

☐ Presenting ☐ Assessed

Thinking about this problem before you connected with me for counseling, how would you rate the severity of your problem?

Please Select

How is your ability to address your issue as compared to when we started counseling?

Please Select

Please Select

Add Additional Problem

Figure 102



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

*High Risk Case ☐ Yes ☐ No

*Reviewed with MOS Consultant ☐ Yes ☐ No

If yes with whom? (Consultant's name)

Legally required report filed by whom?

Legally required report filed when?

Legally required report filed where?

0 of 4000 characters

Figure 103

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

There is a place for you to add "Collateral Notes."

Counseling Goals

1. * work on this coping skill Partially Met

2. Please Select

3. Please Select

Collateral Notes

0 of 32000 characters

Figure 104



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

0 of 32000 characters

Individual Case Details

- + alexis Carrington
- + [ID: 3887] Partner - Male - 33

Figure 105

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



Individual Case Details

alexis Carrington

☐ No-Show

*Statement of Understanding Signed ☒ Yes ☐ No

*Does member have any diagnosis on Axis I or II beyond a V code? ☒ Yes ☐ No

(If yes, refer to a clinical provider)

Risk and Functional Assessment

(Participant's level of impairment at session)

0 = No evidence of impairment; 1 = mild; 2 = moderate; 3 = severe impairment

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

	None / Denies	Current	History
*Domestic Violence	☒	☐	☐
*Child Abuse / Neglect	☒	☐	☐
*Sexual Assault	☒	☐	☐
*Sexual Abuse	☒	☐	☐

Figure 106

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

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*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.

Individual Case Details

+ alexis Carrington

▼ [ID: 3887] Partner - Male - 33

External Id: -77933 ☐ No-Show

*Statement of Understanding Signed ☒ Yes ☐ No

Figure 108



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

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

Counseling Sessions

Total No. of sessions completed: 2

▶ Session 1

10/25/2020

▼ Session 2

10/27/2020

Created by: ValueOptions WebService

10/27/2020 7:15:49 PM UTC

Date of Service: 10/27/2020

Authorization Number: 06-102220-1-1

No-Show: No

Modality: Web-based

Military identification card viewed and verified by provider? Yes

Type of Counseling Provided: Couple

MOS Counselor: TEST L TEST

Counselor's Phone: 212-212-2121

Address: New York, TN 37043

Case Participants

[add](#) [select](#)

▶ 1. [ID: 3887] Partner - Male - 33

+ Add Session

Figure 109

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



8.3. Manage SECO Specialty Consult and SECO Spouse Group Cases

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

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

Follow-Up Date

4/10/2021 5:45 AM

Follow-Up Reason

eagr

Follow-Up Outcome

Please Select

▼

☒ Completed

Create Follow-Up

Follow-Up Date

15

Follow-Up Time

15

Follow-Up Reason

0 of 50 characters

[Follow-Up History](#)

▶

Figure 110



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

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

SECO Coaching Services

Please Select

Please Select

MyCAA Coaching Session

SECO Coaching Package

Video Mock Interview

On-Demand Resume Review

Leveraging LinkedIn Premium

Session Notes

0 of 4000 characters

Contact Notes [add](#)

0 of 4000 characters

☐ Completed

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

Figure 111



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

Session Records Total No. of sessions completed: 1

▼ Session 1 4/18/2021

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

Goals	Goal Status
1. Use Mentoring Services	Not Set

Session Notes

+ Add Session

Case Closing Summary

Contact Notes [add](#)

Figure 112

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

8.4. Manage Document Translation Cases

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

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

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



Follow-Up Date	Follow-Up Reason	Follow-Up Outcome
12/29/2020	gvzdr	Please Select ☒ Completed

Create Follow-Up

Follow-Up Date	Follow-Up Reason
15	
0 of 50 characters	

[Follow-Up History](#) ▶

Document Type*	From Language*	No. of Pages*
School Transcript or Report Card	English	2

Other Document Type	To Language*
	Russian
0 of 50 characters	

Document will be delivered via:	Document will be returned via:	Date received
Mail	Email	12/15/2020

Date mailed
12/28/2020

☒ Translated document was received by participant
☒ Document no longer needs translation

Who does the document belong to?*

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

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

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

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

☐ Completed

Contact Notes [add](#)

Figure 113

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



8.5. Manage Consultation-Based Cases

Consultation-Based cases include:

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

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

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

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

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

☐ Limits of Confidentiality Explained

***Services are for:**

☐ Self

☐ Family Member

Relationship to Participant

Please Select

Sex

Please Select

Age

***Satisfaction Feedback**

☐ Agrees

☐ Declines

Figure 114



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

Correspondence

0 of 32000 characters

Receiving other services?

0 of 500 characters

Describe services required

0 of 500 characters

Referral(s)

Please Select ▼

Add Option

0 of 50 characters

Figure 115



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

List of Conditions

Please Select ▼ Add Option

0 of 50 characters

Specialty Consult Sessions Total No. of sessions completed: 0

+ 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.

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

Create New Session

Consultation Modality* Date of Service*

Please Select ▼ 15

☒ No-Show

☐ Final Session

Cancel Done

Figure 117



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

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

Session Notes

0 of 32000 characters

New MilParent Support Resources Provided By Counselor

☐ Childcare

☐ Early Intervention Services

☐ Federal, State, Local Community Services

☐ Lactation Specialist

☐ Military OneSource Building Healthy Relationship Specialty Consultation

☐ Military OneSource Health & Wellness Coaching

☐ Military OneSource New MilParent Support Consultant

☐ Military OneSource Non-Medical Counseling

☐ Military OneSource Peer Support Specialty Consultation

☐ Military OneSource SECO Services

☐ Other

0 of 50 characters

☐ Military OneSource Special Needs Specialty Consultation

☐ Military OneSource Website

☐ Military OneSource Work Life Specialty Consultation

☐ Other Insurance/Medicaid

☐ Provider referrals - Medical

☐ Provider referrals -Mental health

☐ State or federal programs

☐ Tricare

Correspondence

0 of 32000 characters

☐ Final Session

Cancel

Done

Figure 118



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

Specialty Consult Sessions Total No. of sessions completed: 1

▼ Session 1 4/16/2021

Created By: Lisa 4/18/2021 3:02:54 PM UTC

Date of Service: 4/16/2021

Modality: Video

No Show: No

New MilParent Support Resources Provided By Counselor

+ Add Session

Figure 119

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

8.6. Manage Work Life Cases With Sessions

The following Work Life cases allow Participants to attend sessions:

- Financial
- Tax

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

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

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



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

☒ 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.

0 of 50 characters

Please Select ▼

2.

0 of 50 characters

Please Select ▼

3.

0 of 50 characters

Please Select ▼

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.

Financial Sessions Total No. of sessions completed: 1

▼ Session 1 4/8/2021

Created by: Lisa 4/18/2021 3:15:00 PM UTC

Date of Service: 4/8/2021 Modality: Video

No Show: No

Referral Options Selected
Budgeting

Financial Goals	Goal Status
1. ioliliylo	Met

Case Notes
my session notes have been entered here.

[+ Add Session](#)

Figure 123

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

8.7. Manage Case Types Without Sessions

Case Types without sessions include:

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

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

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



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

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

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

Create Follow-Up

Follow-Up Date

Follow-Up Reason

15

0 of 50 characters

[Follow-Up History](#) ▶

***Services are for:**

☐ Self

☒ Family Member

***Relationship to Participant**

Family Member Dependen ▼

***Sex**

Female ▼

Age

48

Receiving other services?

Describe services required

She is not receiving other services at the moment.

She would like to receive services related to determining a major and time management.

51 of 500 characters

87 of 500 characters

Referral(s)

Educational Institution

Military OneSource Health & Wellness Coaching

Please Select ▼

Add Option

0 of 50 characters

[Remove](#)

[Remove](#)

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.”

Case Closing Summary

0 of 4000 characters

Closing Reason

Please Select

☐ Completed

Contact Notes

add

▶ 1 Lis

4/17/2021 3:07:39 PM UTC

▶ 2 Lis

4/17/2021 2:53:54 PM UTC

▶ 3 Lis

4/17/2021 2:53:20 PM UTC

▶ 4 Lis

4/17/2021 2:52:22 PM UTC

▶ 5 Lis

4/17/2021 2:49:45 PM UTC

Void

[Cancel](#)

Save

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.

View Participant

Create CaseEdit

Participant Name and Information

First	Middle	Last	Suffix
Jane	Q	Doe	
DOB	Sex	Marital Status	
2/2/2018	Female	Single	

Current Address

Address		
123 Test Drive		
City	State	Postal Code
Ville	SD	55555
Country		
United States		

Telephone

Preferred Phone	Work Phone
111-222-3333	Cell Phone
Confidential	555-555-5555
	Confidential

Email

Eligibility Info

Service Member?
No

Relation
Family Member Dependent Child

Pay Grade
E-7

Branch of SVC
Army

Eligibility Status
Active Duty

Separation/Retirement Date

Minor Participant

Assigned Installation
Joint Base Langley-Eustis (JBLE)

CRISIS / DTW / MR

PROGRAM REFERRALS

RELATED CASES

NOTES

Figure 126



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

DASHBOARD

PARTICIPANT OVERVIEW

Name

Jo Marie Zee

Participant ID

585069

Current Address

123 Happy Street
Apt 2
Awesomeville, PA 12345
United States

Preferred Phone

2-222-222-2221
Confidential

Work Phone

3-333-333-3333

Cell Phone

444-444-4444
Confidential

Email Address

BestEmailAddress@Awes
omeEmails.com

Notes by Case Type

Current View: Notes by Case Type

[Preview All Cases' Notes](#)

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

CRISIS /DTW/MR

PROGRAM REFERRALS

RELATED CASES

NOTES

Figure 127



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

Notes by Case Type

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

CRISIS/DTW/MR

PROGRAM REFERRALS

RELATED CASES

NOTES

Figure 128



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

Notes by Case Type

Current View: Notes by Case Type

[Preview All Cases' Notes](#)

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

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

Figure 129



View Notes

Current View: All Education Notes

[Return to Notes by Case Type](#)

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

Figure 130



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

Notes by Case Type

Current View: Notes by Case Type

[Preview All Cases' Notes](#)

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

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

Figure 131



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

Notes by Case Type

Current View: Notes by Case Type

[Hide All Cases' Notes](#)

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

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

▼ Elder Care

[View all \(1\) notes](#)

Case #	Date	Time	Note Type
958326	9/19/2017	11:36 AM UTC	Handoff
handoff note here			



9. Other Incoming Calls

9.1. Quick Tracker

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

Search

First Name

Middle Name

Last Name

Phone

DOB

Search Type

Primary Email

Participant ID

Case Number

Search

Clear

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

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QUICK TRACKER

Figure 132

Electronic Case Management System | User Guide

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

Search

First Name First Name	Middle Name MI	Last Name Last Name	Participant ID Participant ID
Phone Phone	DOB 	Search Type Participant	Case Number Case ID
Primary Email Email			

QUICK TRACKER

- ☐ American Red Cross
- ☒ Base Resources
- ☐ BeThere
- ☐ CG Support
- ☐ Community Resources
- ☐ DFAS
- ☐ DSN Number
- ☒ Financial Assistance
- ☐ GI/VA Loan Information
- ☐ Government Program
- ☐ Housing
- ☐ JAG Phone Number
- ☐ Legal

Done

Name	Address
------	---------

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.

Follow-Up History ▾

☐ Unable to schedule for appointment within 3 business days

Closing Reason
Please Select ▾

☐ Completed

Void

Cancel Save Done

Figure 134

When finished entering your note, select “Done.”

Participant p

Create Fo

Follow-Up

Follow-Up

20 of 32000 characters

cancel Done

add

Figure 135



Saved notes can be viewed in the “Contact Notes” container.

The screenshot shows a form with several fields: a checkbox for 'Unable to schedule for appointment within 3 business days', a 'Closing Reason' dropdown menu with 'Please Select' as the current selection, and a checkbox for 'Completed'. To the right of these fields is a 'Contact Notes' container with a red border. The container has a title bar with 'Contact Notes' and an 'add' link. Below the title bar is a list of notes: '1 Lisa Greer 4/17/2021 3:43:07 PM UTC' and '2 Lisa Greer 4/17/2021 3:42:49 PM UTC'. Below the list is a text area containing the text 'Here is the note I entered.' At the bottom of the form are three buttons: 'Void', 'Cancel', and 'Save Done'.

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.

The screenshot shows a form with several sections: 'Confidential' (with a redacted cell phone number), 'Assigned Installation' (Fort Bliss), 'Email' (MyBestEmail@mail.com), 'Additional Information' (Requires Interpreter: No, Receive Outreach Communications: Not Applicable - Minor Participant), and 'How did the contact participant hear about the program?'. To the right of these sections is an 'Administrative Notes' container with a red border. The container has a title bar with 'Administrative Notes'. Below the title bar is a list of notes: '1 Lisa Greer 4/10/2021 10:16:45 PM UTC' and '2 Lisa Greer 4/10/2021 10:13:32 PM UTC'. Below the list is a text area.

Figure 137



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

Other Source

Time Zone
Please Select ▼

☐ Do Not Use - Duplicate record

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

Last Modified By

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

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

☐ Administrative Notes Need Review

Administrative Notes add

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

Figure 138

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

Add Note ✕

I have entered my administrative note here

42 of 32000 characters

[cancel](#) Done

Figure 139



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

Other Source

Time Zone
Please Select ▼

☐ Do Not Use - Duplicate record

Created By

☒ Administrative Notes Need Review

Administrative Notes [add](#)

▶ 1 Lisa	4/17/2021 3:51:01 PM UTC
▶ 2 Lisa	4/17/2021 3:50:36 PM UTC

Figure 140

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

Confidential

Email

Email Address
MyBestEmail@mail.com

Additional Information

Requires Interpreter
No

Receive Outreach Communications
Not Applicable - Minor Participant

How did the contact participant hear about the program?

R Administrative Notes Need Review

▶ 1 Lisa	4/17/2021 3:51:01 PM UTC
▶ 2 Lisa	4/17/2021 3:50:36 PM UTC
▶ 3 Lisa	4/10/2021 10:16:45 PM UTC
▶ 4 Lisa	4/10/2021 10:13:32 PM UTC

Figure 141



10. Reports

10.1. Overview

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

Reports

Your permissions allow you to run the following reports.

[Data Warehouse](#)

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

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

[Case Demographics Report](#)

[NMCO Stale Cases Report](#)

[Program Study Consent Report](#)

[SECO Case Activity Report](#)

[SECO Case Demographics Report](#)

[SECO Closed Case Activity Report](#)

[SECO Inactive Case Report](#)

[SECO Participant Demographics Report](#)

[SECO Unassigned Case Report](#)

[Session Demographics Report](#)

[Quick Call Categories](#)

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

[Tax Outreach Support Report](#)

[Transition Assistance Program Data Report](#)

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

Figure 142



10.2. List Reports

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

The following are List Reports:

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

10.3. Summary Reports

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

The following are Summary Reports:

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

10.4. Dimensional Aggregate Reports

For Dimensional Aggregate Reports you will again provide filter criteria. In addition, you must select dimensions for aggregates (total numbers of records) across X and Y dimensions. The numbers in each cell of the result represent the total number of records that meet the criteria on each dimension. For example, if 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.

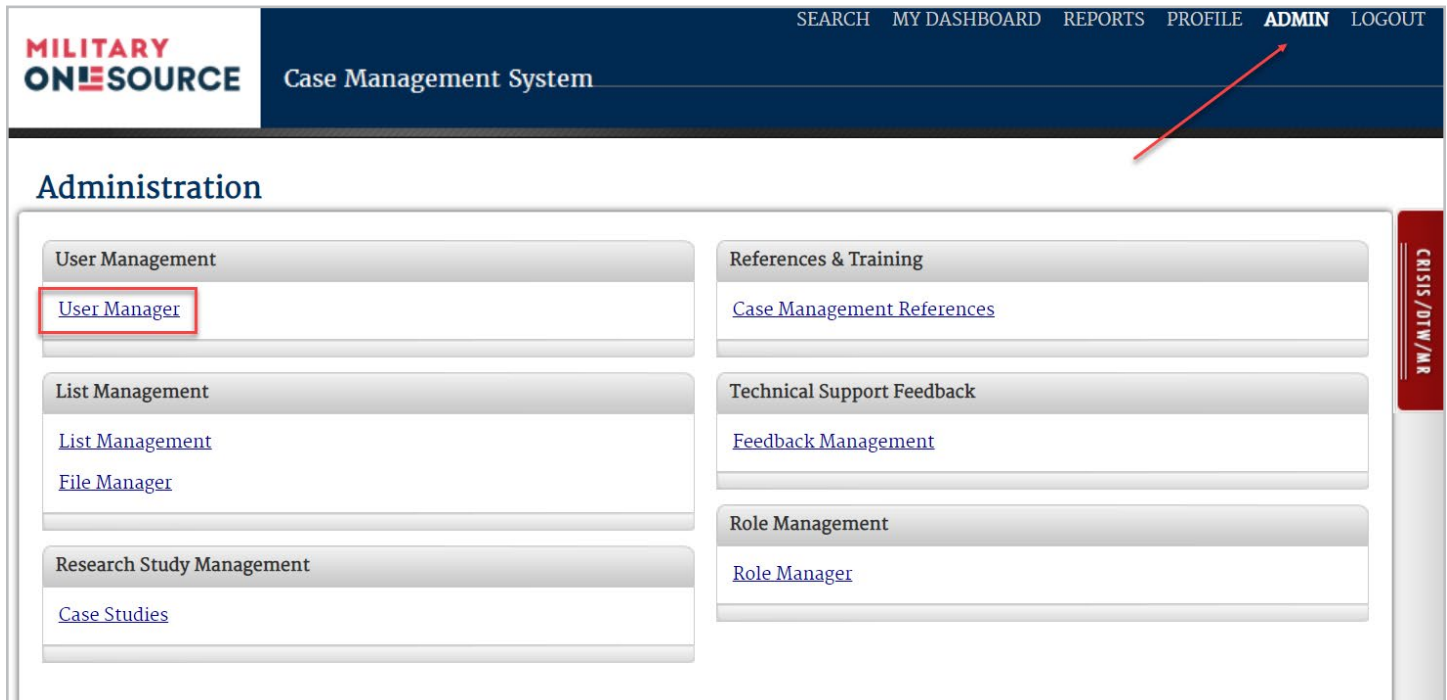


Figure 143



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.

User Manager

Invite User

Name

Email

Jane

Role

Please Select

Hide/Show Deleted Accounts

Default - Hide Deleted Accounts

Search

Clear

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

Users 1 - 3 of 3

Page 1 of 1 Go Previous | Next

Figure 144

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

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



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

User Manager

Invite User

Name

Email

Jane

Role

Hide/Show Deleted Accounts

Please Select

Default - Hide Deleted Accounts

Search

Clear

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

Users 1 - 3 of 3

Page 1 of 1 Go Previous | Next

Figure 145



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

Invite User

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

First Name *

Last Name *

Email Address *

Jim

Smith

jim.smith@bestmail.com

Roles *

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

[Cancel](#) [Invite](#)

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.



Registration Invitation

Invitation Status Expired

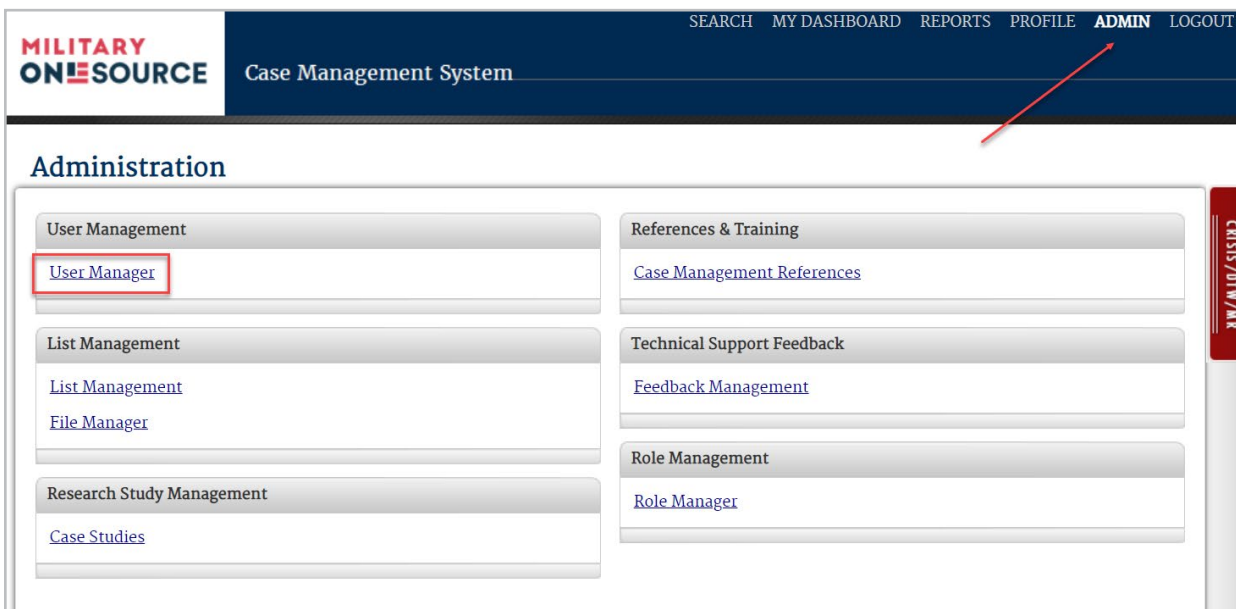
Invite Expired On 3/21/2018 2:44:02 PM

[Cancel Invite](#) [Send New Invite](#)

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.



MILITARY ONESOURCE Case Management System

SEARCH MY DASHBOARD REPORTS PROFILE **ADMIN** LOGOUT

Administration

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

CRISIS /OTW/MR

Figure 148

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

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



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

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

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

User Manager

[Invite User](#)

Name

tina

Email

tina. .com

Role

Please Select

Hide/Show Deleted Accounts

Default - Hide Deleted Accounts

Search

Clear

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

Users 1 - 1 of 1

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

Figure 149



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

View Profile

[Back](#)[Edit](#)

First Name Tina

Last Name [REDACTED]

Email tina.v [REDACTED] .com

Roles

Specialty Consultant Supervisor

Login Information

Last Login Date 09-10-2014 00:51:03 UTC

Last Login IP 65.246.88.3

Last Failed Login Date 07-30-2014 17:52:04 UTC

Last Failed Login IP 65.246.88.3

CAC/ECA Change Request

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

[Send Change Request](#)

Figure 150



11.2.6. HOW TO DISABLE A USER

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

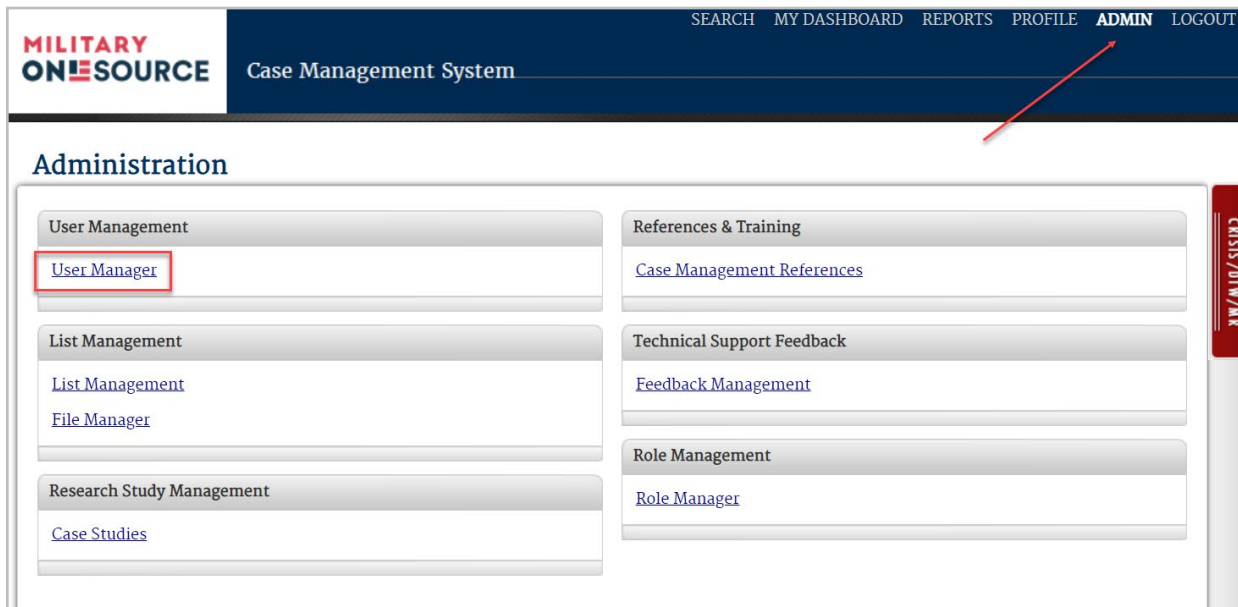


Figure 151

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

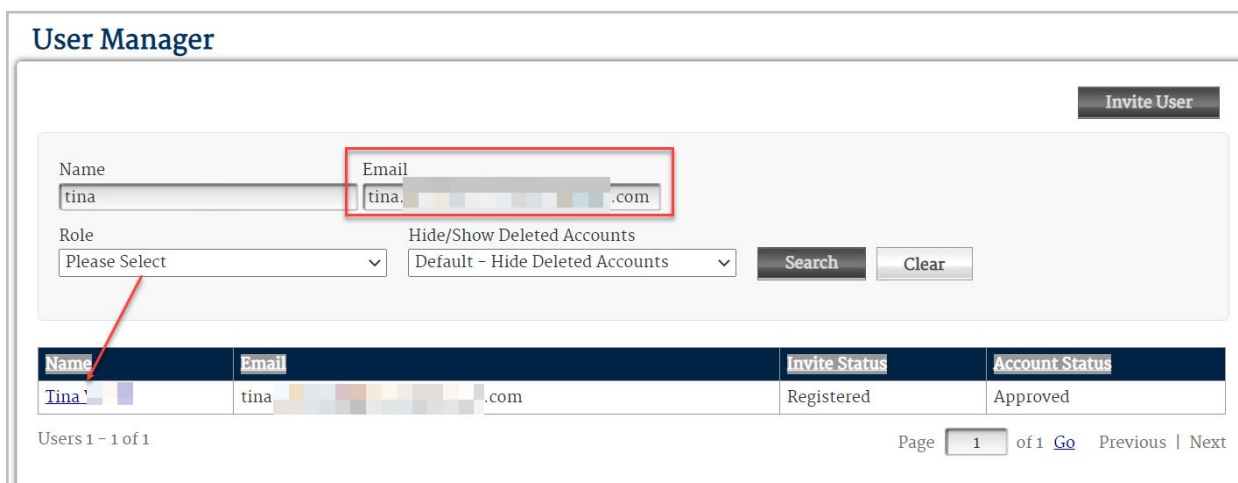


Figure 152



Open the “Edit” view.

View Profile [Back](#) [Edit](#)

First Name Tina

Last Name [redacted]

Email tina.[redacted].com

Roles

Specialty Consultant Supervisor

Figure 153

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

Update * = required

First Name * Tina

Last Name * [redacted]

Email * tina.[redacted].com ☒ Approved

Roles *

Figure 154

11.3. List Management

11.3.1. OVERVIEW

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



11.3.2. MANAGING LISTS

List Management is found in the Admin screen.

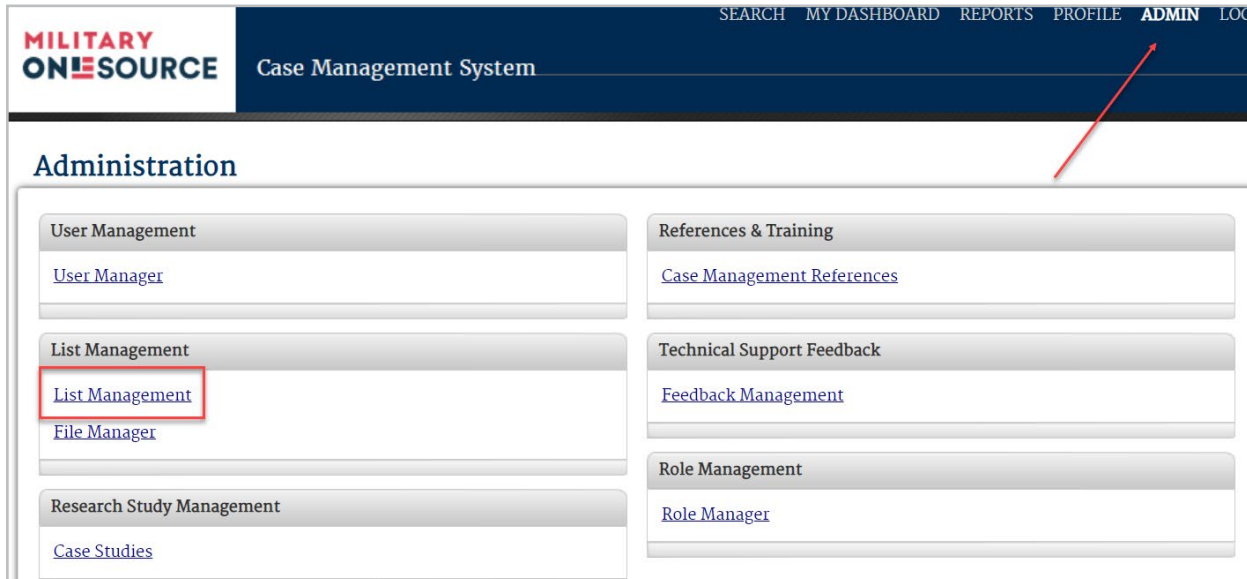


Figure 155

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

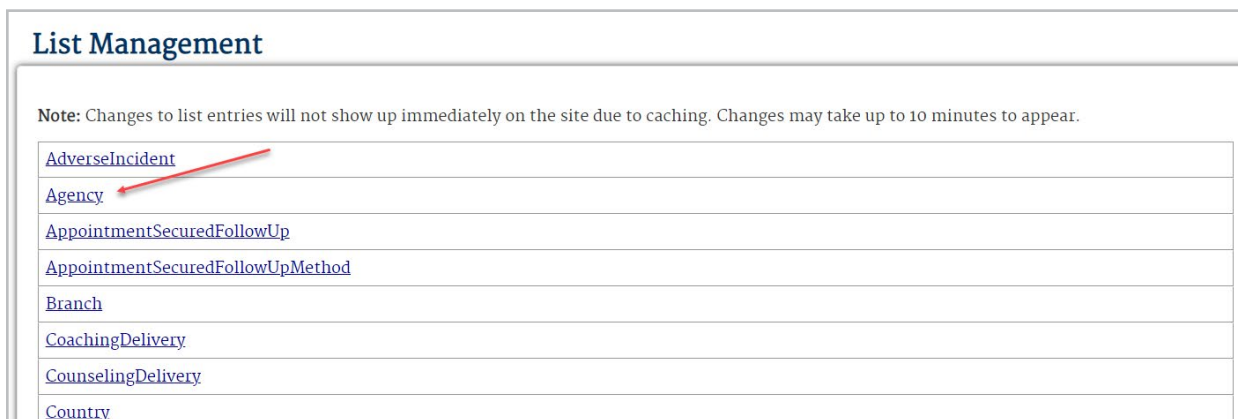


Figure 156



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

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

Figure 157

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

Entry Name
My new list item

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

Figure 158

The new entry appears in the list and is enabled.

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

Figure 159



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

11.4. File Manager

File Manager is found in the Admin screen.

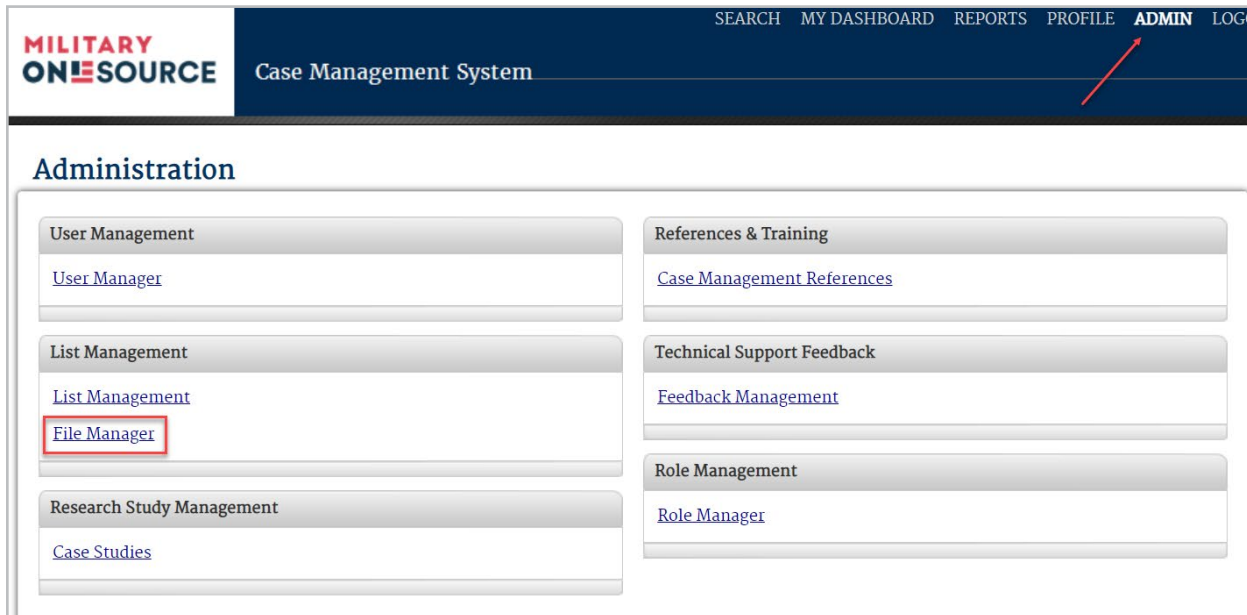


Figure 160

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

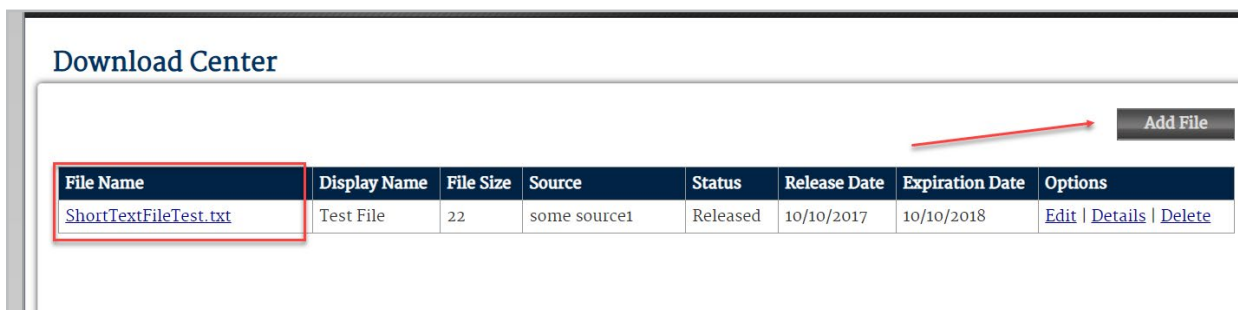


Figure 161



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

The screenshot shows the 'Add File' form. The 'Upload File' section has a 'Choose File' button highlighted with a red box. Below it, the text 'No file chosen' is visible. The form includes fields for 'Display Name', 'File Description', 'File Status' (a dropdown menu currently showing 'Please Select'), 'Source', 'Release Date', and 'Expiration Date'. At the bottom right, there are 'Cancel' and 'Save' buttons.

Figure 162

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

The screenshot shows the 'Add File' form with the following details filled in: 'Choose File' is 'My Test File.docx', 'Display Name' is 'My Text File', 'File Description' is 'Test data in a Word document', 'File Status' is 'Approved But Not Released', 'Source' is 'My computer files', 'Release Date' is '04/19/2021', and 'Expiration Date' is '03/16/2022'. A red arrow points to the 'Save' button at the bottom right.

Figure 163



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

Update File

File NameMy Test File.docx

Display Name

File Description

My Text File

Test data in a Word document

File Status

Source

Release Date

Expiration Date

Approved But Not Release

My computer files

4/19/2021

3/16/2022

Roles

☒ Admin

☒ Call Center Supervisor

☐ OSD Program Staff

☐ Clinical Network Manager

☒ Specialty Consultant Supervisor

☐ Specialty Consultant

☐ Vendor Program Manager

☐ Triage Consultant

☐ Quality Assurance and Auditors Vendor

☐ Network Manager

☐ SECO Advisor

☐ SECO Specialty Consultant

☐ SECO Specialty Consultant Supervisor

☐ User Manager Administrator

☐ RAND Research Staff

☐ OSD Program Staff Reporting

☐ AAR Webservice

☐ QA Supervisor

☐ Developer

☐ Service Liaison

☐ service

☐ TAP Data and Reporting

Cancel

Save

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.

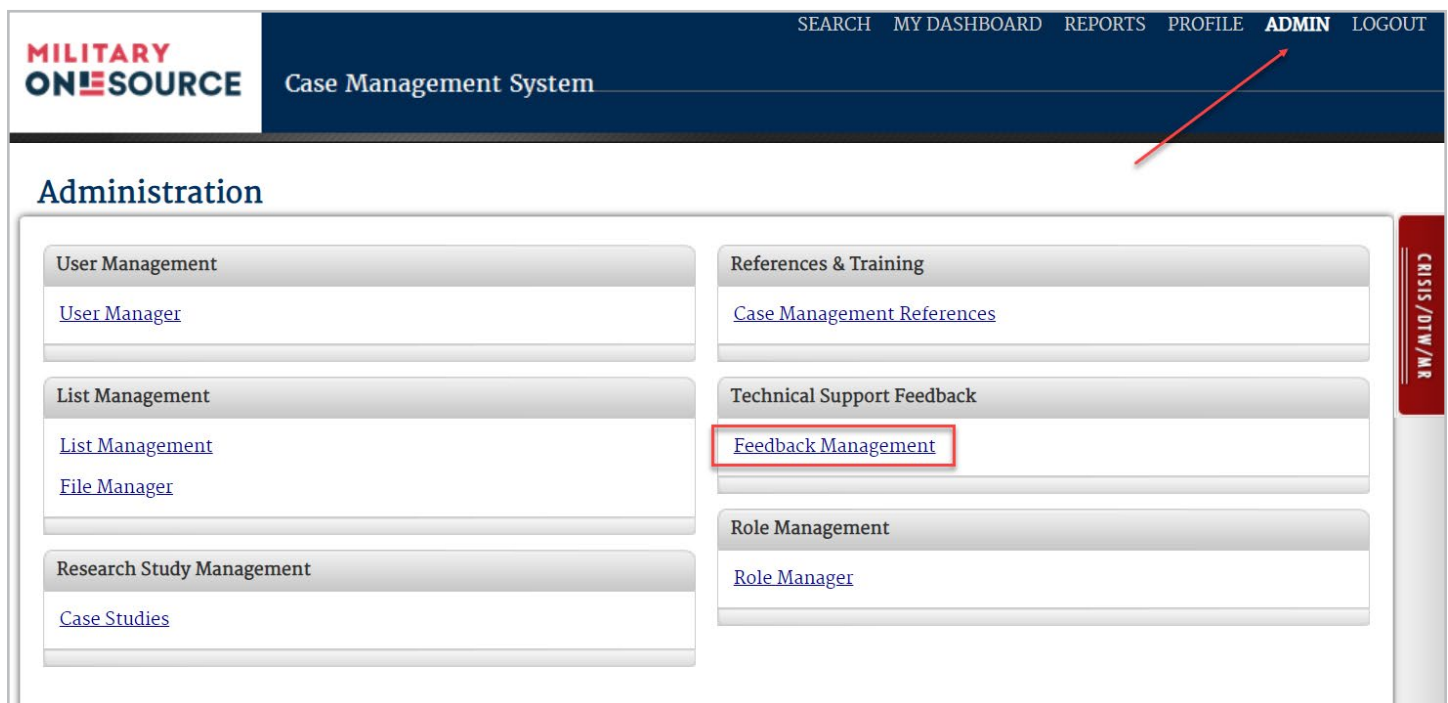


Figure 167



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.

**MILITARY
ONESOURCE** Case Management System

SEARCH MY DASHBOARD REPORTS PROFILE **ADMIN** LOGOUT

Administration

User Management User Manager	References & Training Case Management References
List Management List Management File Manager	Technical Support Feedback Feedback Management
Research Study Management Case Studies	Role Management Role Manager

CRISIS/OTW/MR

Figure 168



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

Roles

Welcome to the **Role Management Page**

Select the role you would like to manage permissions for.

System Roles

- [Admin](#)
- [Call Center Supervisor](#)
- [Clinical Network Manager](#)
- [Network Manager](#)
- [OSD Program Staff](#)
- [OSD Program Staff Reporting](#)
- [Quality Assurance and Auditors Vendor](#)
- [SECO Advisor](#)
- [SECO Specialty Consultant](#)
- [SECO Specialty Consultant Supervisor](#)
- [Specialty Consultant](#)
- [Specialty Consultant Supervisor](#)
- [Triage Consultant](#)
- [User Manager Administrator](#)
- [Vendor Program Manager](#)

Miscellaneous Roles

- [AAR Webservice](#)
- [Developer](#)
- [RAND Research Staff](#)

User Defined Roles

- [SECO Triage Consultant](#)
- [Secure Reporting](#)
- [Service Liaison](#)

[Add Role](#)

Figure 169



Edit Role: Admin

Permissions

Admin

Miscellaneous

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

Role Management

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

User Management

- | | |
|--|-----------------|
| ☒ Create | Invite new user |
|--|-----------------|

Figure 170



12. Requesting Support

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

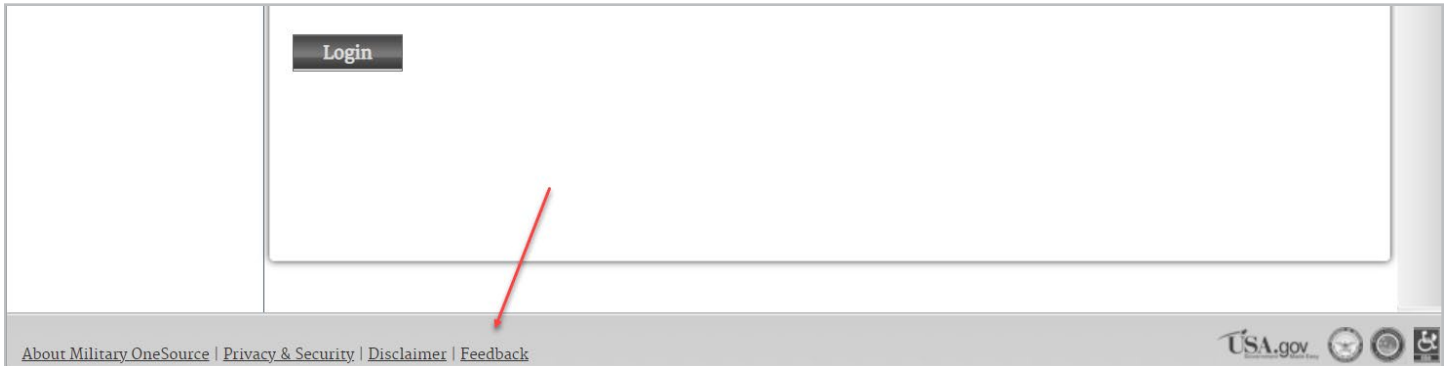


Figure 171